

**USER MANUAL FOR AUTHORITY TO RECRUIT /  
NEW APPOINTMENT (INCLUDING TRANSFERS AND REHIRES)  
PROCESS**



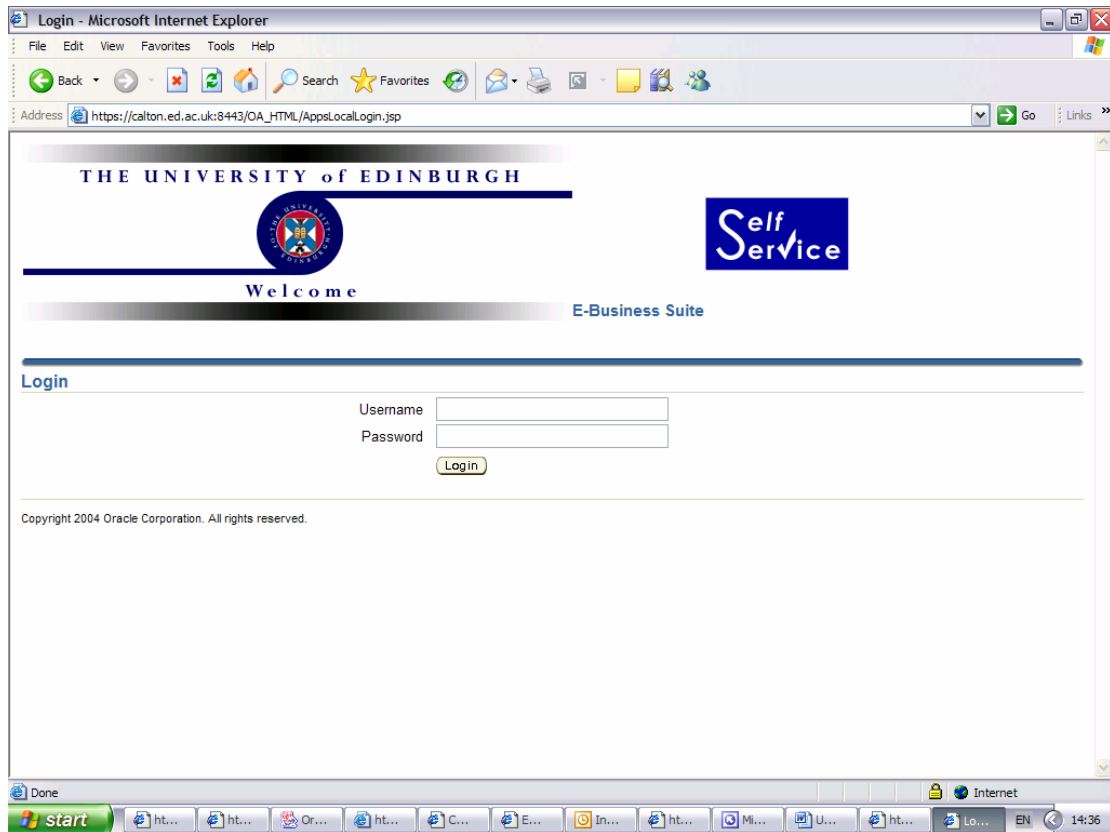
**ORIGINATOR**

## SECTION 1 - LOGIN

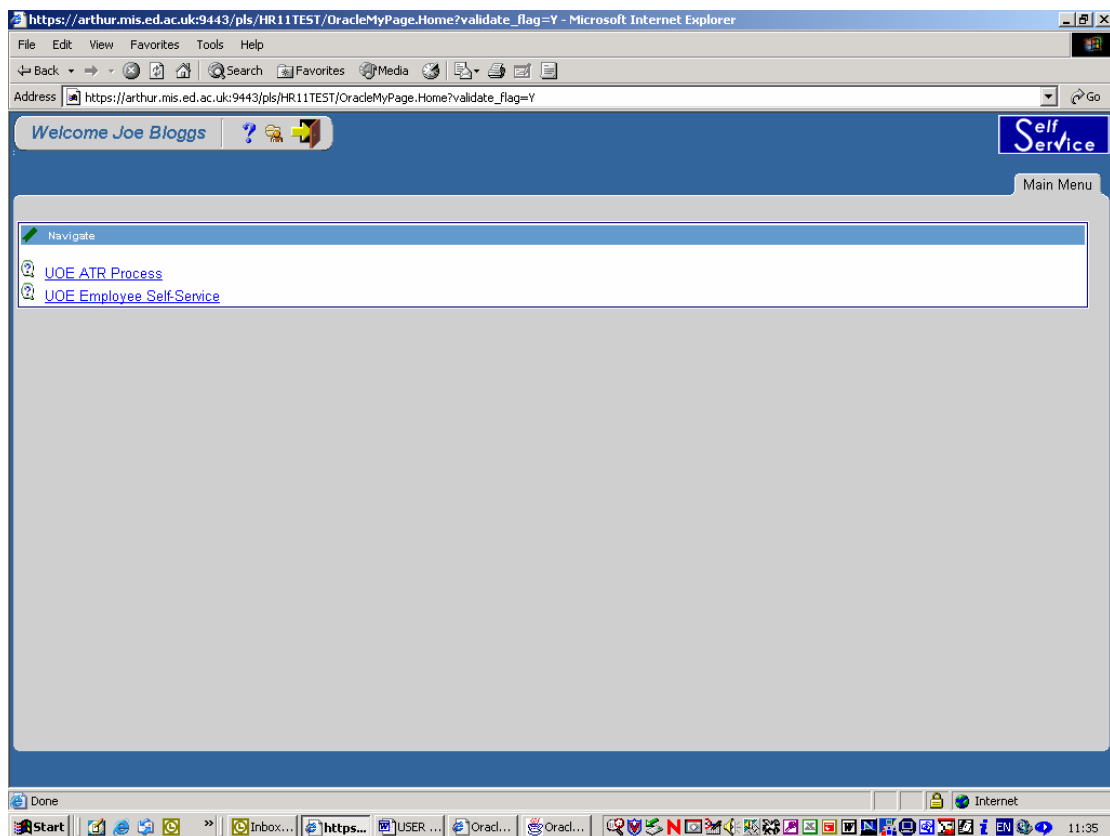
Open up Internet Explorer and go to the following URL:

[https://fenton.mis.ed.ac.uk:8443/OA\\_HTML/AppsLocalLogin.jsp](https://fenton.mis.ed.ac.uk:8443/OA_HTML/AppsLocalLogin.jsp)

The login box will then appear with two fields requesting your username and password. Complete these and click on LOGIN.

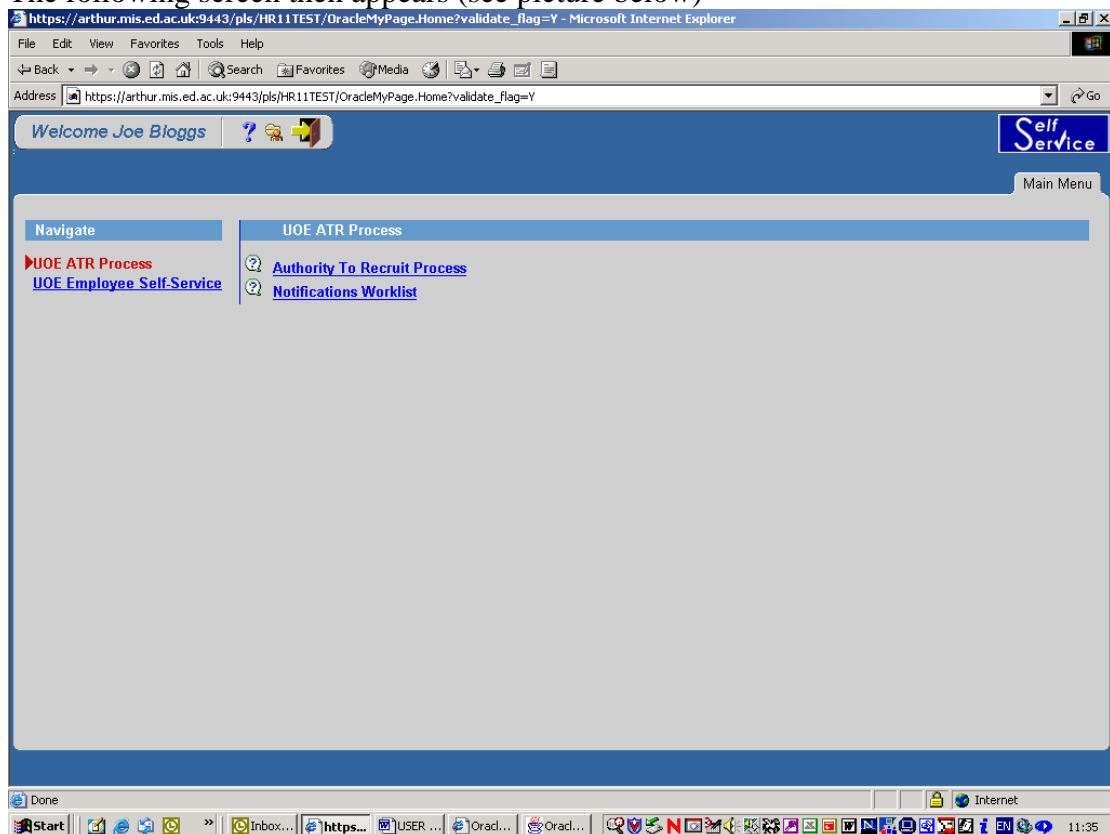


The Main Menu will then appear (see picture below)



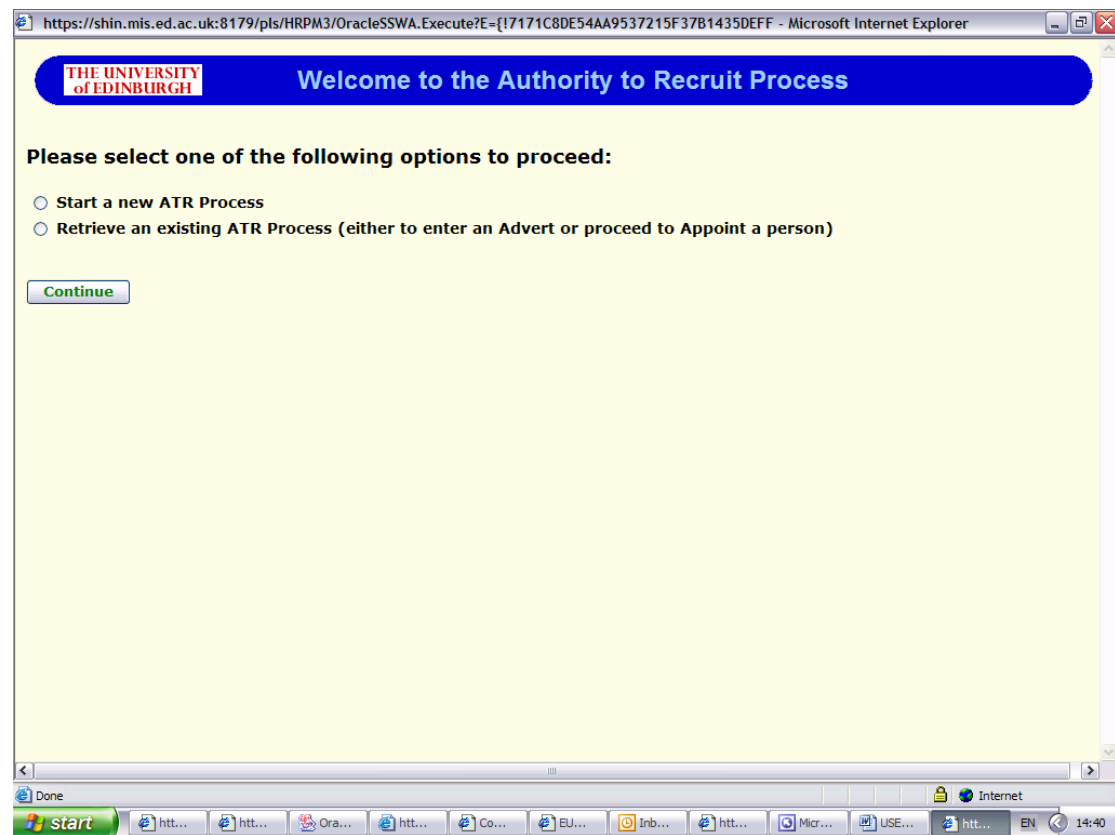
Click on UOE ATR Process

The following screen then appears (see picture below)



Click on Authority To Recruit Process

A query screen will appear (see picture below):



There are 2 options.

To start a new ATR Process, the following pages will show you how to complete this.

To retrieve an existing ATR Process, see [Section 4](#).

Click in the circle next to the relevant option then click on CONTINUE to move to the next screen.

## **SECTION 2 – COMPLETION OF AUTHORITY TO RECRUIT (ATR)**

Authority to Recruit Screen (see example below)

Complete the following fields (\*mandatory fields):

- College/Support Group\*
- Organisation\*- (The level 5 unit to which the position belongs)
- Post\* - (If New, a Grading Approval Number is mandatory – provided by your HR Manager/Advisor. If existing the full name of the Current/Previous Position Holder must be provided)

Current/Previous Position Holder – (Existing positions only, see notes for Post)

Grading Approval Number – (New positions only, see notes for post)

- Job Title\* - (Title successful applicant will have on their contract)
- Earliest Start Date\*
- Latest Start Date\* - (Defaults to 6mths after earliest start but can be amended)
- Max Grade for Post\* - (The highest grade you would wish to appoint at)
- Employment Category\* - (The type of contract; choose from, Permanent, Fixed Term or Hours to be Notified. If Fixed Term chosen either FT End Date or Duration and FT Reason must be completed)

FT End Date – (Fixed Term only, see notes for Employment Category)

FT Duration - (Fixed Term only, see notes for Employment Category)

FT Reason – (Fixed Term only, see notes for Employment Category)

- Full/Part Time\* - (If F/T is entered in the Full/Part Time field then the Maximum Num of Hours will automatically be populated with the correct full time hours. If P/T is entered then you must enter the number of working hours, except in the case of Hours to be Notified (Employment Category) the hours should be zero)
- Maximum Num of Hours\* - (See notes for Full/Part Time)
- Constraint: appoint no higher than grade step (if applicable) – (Only required if there is a constraint on funding for the salary e.g. appoint no higher than point 3 on UE07)

- **Wef 23/9/05** Disclosure Field \* - This field must be completed with one of the following 2 options, Disclosure Required or Disclosure not Required. Information regarding this field can be found on the screen (see example below)

**THE UNIVERSITY of EDINBURGH** Enter Authority to Recruit Details

**Please enter Authority to Recruit Details:**

College/Support Group \*  Organisation \*

Post \*  Current/Previous Post Holder

Grading Approval Number (New Post)  Job Title \*

Earliest Start Date \*  Latest Start Date \*  Max Grade for Post \*

Employment Category \*  FT End Date

FT Duration Years:  Months:  FT Reason

Full/Part Time \*  Maximum Num of Hours \*

Constraint: Appoint no higher than grade step(if applicable)

The Protection of Children (Scotland) Act 2003 makes it a criminal offence to offer work in a "Childcare position" (defined as a position involving caring for, teaching, training or supervising children under 18) to anyone disqualified from working with children. An Enhanced Disclosure check is therefore required for all posts falling within this definition. The Disclosure box below must therefore be completed and the "Disclosure not required" option may only be chosen if you are fully satisfied that the duties of this post do not fall within the definition of a "Childcare position". If in any doubt contact your School Administrator or the College HR team before submitting this form.

Disclosure \*:

Note: Fields marked with an asterisk (\*) are mandatory

[Continue](#)

Click on CONTINUE to move to the next screen.

A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. **Once you click on CONTINUE you cannot go back and make any amendments.**

THE UNIVERSITY of EDINBURGH

## Confirm ATR Details

Please check that the following details are correct before pressing Continue

|                                    |                                 |
|------------------------------------|---------------------------------|
| College/Support Group:             | Corporate Services Group        |
| School/Planning Unit:              | Human Resources Planning Unit   |
| Organisation:                      | Human Resources                 |
| Post Type:                         | New                             |
| Current/Previous Post Holder:      |                                 |
| Grading Approval Num (New Post):   | ABC123                          |
| Job Title:                         | HR Assistant                    |
| Max Grade for Position:            | UE04                            |
| Earliest Start Date:               | 1-Aug-2006                      |
| Latest Start Date:                 | 1-Feb-2007                      |
| Employment Category:               | Fixed Term                      |
| FT End Date:                       |                                 |
| FT Duration Years:                 | 1                               |
| FT Duration Months:                |                                 |
| FT Reason:                         | Restricted/Time Limited Funding |
| Full/Part Time:                    | Full Time                       |
| Maximum Number of Hours:           | 35                              |
| Appoint no higher than Grade Step: |                                 |
| Disclosure Scotland:               | Disclosure Not Required         |

Click on CONTINUE to move to the next screen.

## Salary Charging Screen (see example below)

Please complete the following fields:


- Percentage of Salary Charging\* - (enter the percentage of the new employees salary to be charged to a Cost Centre, Account Code and Job Code. You may enter more than one line if the funding is split (i.e. 50%-50%, 50%-25%-25%) as long as the total is 100%)
- Cost Centre\* - (i.e. 424000)
- Account Code\* - (i.e. 2140)
- Job Code\* - (i.e. S00001)
- **Funding Source\* - this is the funding source/body that the employee's salary will be charged to, the following rules should be applied when completing this field:**
  - **Job Code = Snnnnn (i.e. S00001) then always use funding code UNIVERSITY OF EDINBURGH**
  - **Job Code = Bnnnnn (i.e. B00001) then always use funding code DEPARTMENTAL INCOME**
  - **Job Code = Gnnnnn (i.e. G00001) then always use funding code DEPARTMENTAL FUNDS**
  - **Job Code = Dnnnnn then always use funding code DEPARTMENTAL DONATIONS**
  - **Job Code = Ennnnn then always use funding code ENDOWMENT**
  - **For all other Job Codes (beginning R etc) please select the funding source/body from the pick list.**

The system will check that each part of the costing is a valid code. It will also check that the job code can be used with the account code quoted e.g. job code R12345 account code must begin with a 3 i.e. 3012.

The comments box allows the Originator to inform the Approver of any further information required on salary charging.



https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\_ATR\_ADVERT\_SCREEN.commit\_atr\_details - Microsoft Internet Explorer



Enter Salary Charging Details

Please enter Salary Charging Details:

|                   | %   | Cost Centre | A/C Code | Job Code | Funding Source          |    |
|-------------------|-----|-------------|----------|----------|-------------------------|----|
| Salary Charging * | 100 | 424CHR      | 2140     | S00001   | University Of Edinburgh | .. |
|                   |     |             |          |          |                         | .. |
|                   |     |             |          |          |                         | .. |
|                   |     |             |          |          |                         | .. |
|                   |     |             |          |          |                         | .. |

Comments

Note: Fields marked with an asterisk (\*) are mandatory

[Continue](#)

Click on CONTINUE to move to the next screen.

A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. **Once you click on CONTINUE you cannot go back and make any amendments.**

THE UNIVERSITY of EDINBURGH

## Confirm Salary Charging Details

Please check that the following details for ATR Number CSG6893 are correct before pressing Continue

Salary Charging Details:

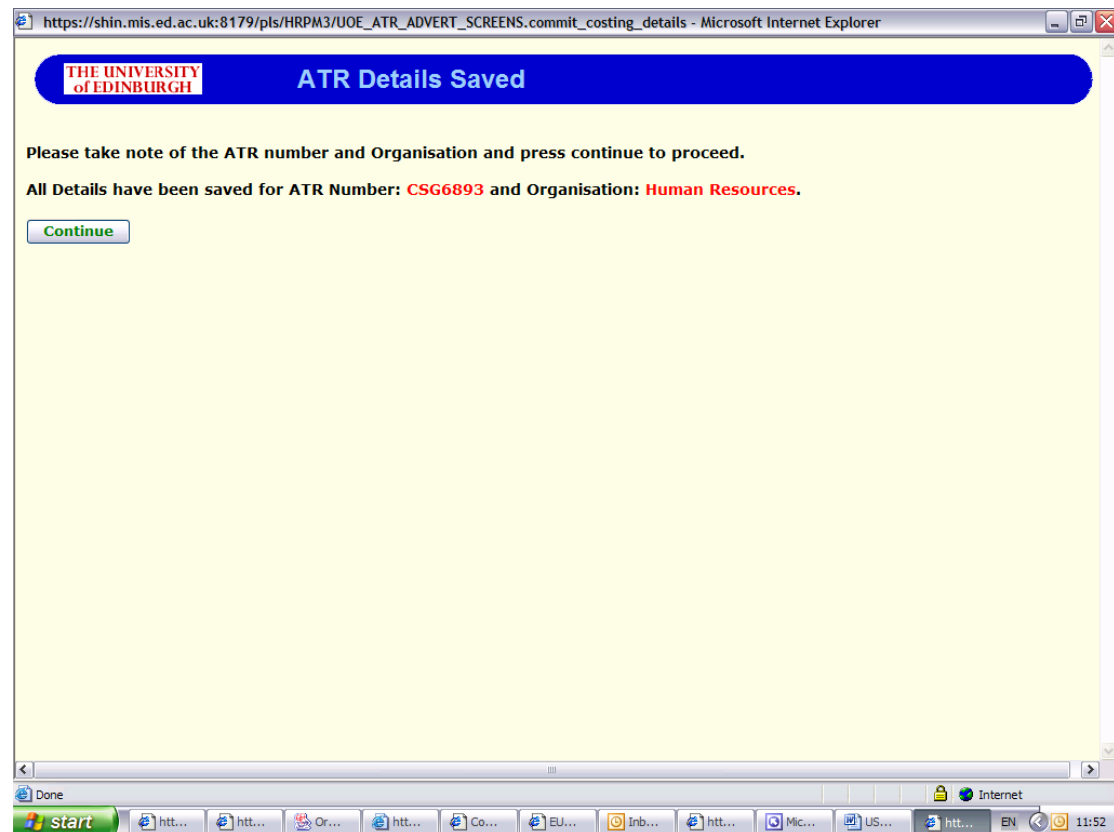
| %   | Cost Centre | A/C Code | Job Code | Funding Source          |
|-----|-------------|----------|----------|-------------------------|
| 100 | 424CHR      | 2140     | S00001   | University Of Edinburgh |

Comments

Click on CONTINUE to move to the next screen.

A screen will then appear (see picture below) confirming the ATR details have been saved.

**An ATR Number will be provided along with the name of the relevant Organisation, please ensure to take a note of both of these, as the information will be required to retrieve the completed process at a later stage ([see section 4](#)).**



Click on CONTINUE to move to the next screen.

The following screen will appear asking you to choose an option that relates to the position to which you are recruiting (click in the circle next to the relevant one):

The screenshot shows a web browser window with the address bar displaying `https://arthur.mis.ed.ac.uk:9443/pls/HR111TEST/UOE_ATR_WORKFLOW.check_position_type`. The page has a blue header with the University of Edinburgh logo and the title 'Check Position Type'. Below the header, the text 'Please check appropriate box:' is followed by three radio button options:

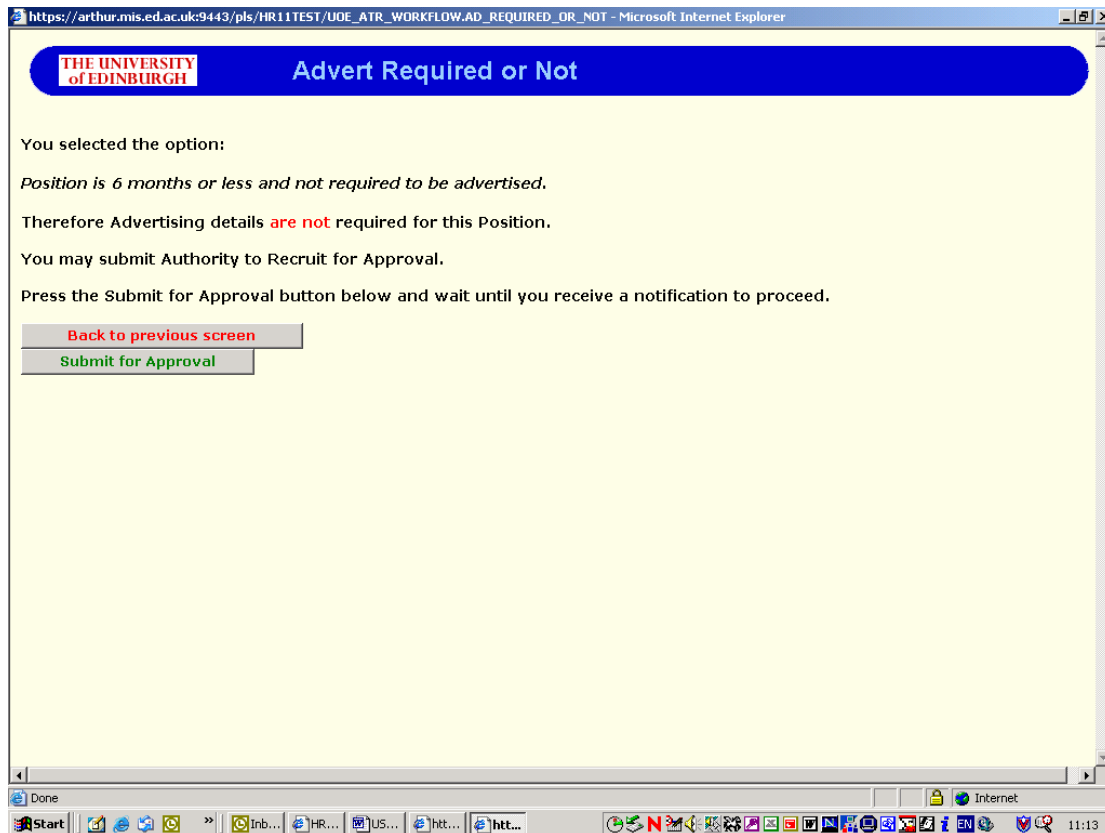
- ☐ Position is 6 months or less and not required to be advertised
- ☐ Position Holder is named on Grant and not required to be advertised    Position Holder Name \*
- ☐ Position is required to be advertised

A green 'Continue' button is located below the options. The browser's taskbar at the bottom shows the Start button, several open applications, and the system clock displaying 11:06.

The following pages will deal with each of the three options noted.

Once the appropriate option has been selected click on CONTINUE to move to the next screen.

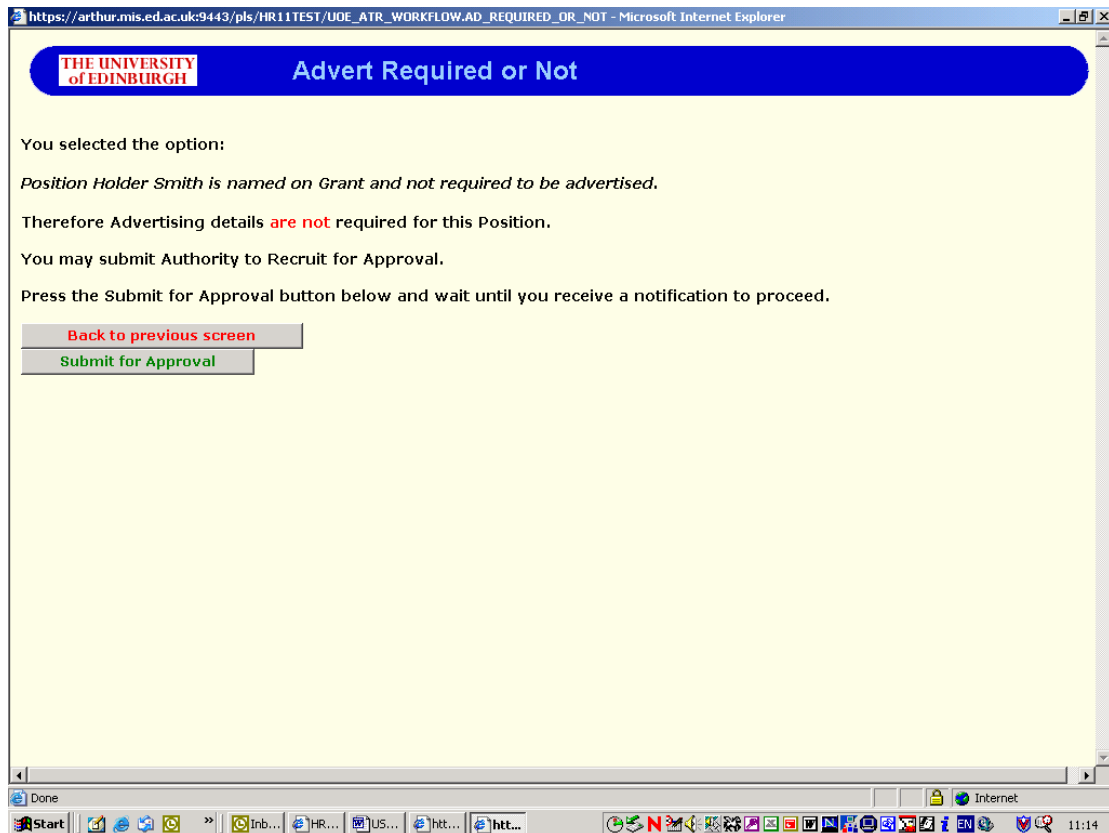
If you select 'Position is 6 months or less' the following screen will appear (see picture below):



Click on SUBMIT FOR APPROVAL.

Once you have submitted this you will receive notifications at different stages of the process ([see Section 5](#)).

If you select 'Position Holder is named on Grant' you must also complete their full name in the box provided. The following screen will appear (see picture below):



Click on SUBMIT FOR APPROVAL.

Once you have submitted this you will receive notifications at different stages of the process ([see Section 5](#)).

If you select 'Position is required to be advertised' then a screen will appear requesting further information (see picture below):

The screenshot shows a web browser window with the URL [https://arthur.mis.ed.ac.uk:9443/pls/HR111TEST/UOE\\_ATR\\_WORKFLOW.AD\\_REQUIRED\\_OR\\_NOT](https://arthur.mis.ed.ac.uk:9443/pls/HR111TEST/UOE_ATR_WORKFLOW.AD_REQUIRED_OR_NOT). The page header features the University of Edinburgh logo and the title "Advert Required or Not". The main content area has a yellow background and contains the following text:

You selected the option:  
*Position is required to be advertised.*

Therefore Advertising details **are** required for this Position.

Please answer the following questions.

Are Advertising Details known at this point?

Is this position to be externally advertised? (i.e. not internal candidates only)

At the bottom of the form, there are two buttons: "Back to previous screen" (with red text) and "Continue" (with green text).

The system will default to yes for 'Is this position to be externally advertised?' this can be amended to no for recruiting internal candidates only.

There are 4 options:

1. Advertising details known and externally advertised - i.e. yes/yes
2. Advertising details known and not externally advertised (internal candidates only) – i.e. yes/no
3. Advertising details not known and externally advertised – i.e. no/yes
4. Advertising details not known and not externally advertised (internal candidates only) – i.e. no/no

The following is how each of these should be dealt with.

Once the appropriate option has been selected click on CONTINUE to move to the next screen.

## **SECTION 3 – COMPLETION OF ADVERT DETAILS**

### **Option 1 - Advertising details known and externally advertised (see example below)**

Complete the following fields (\*mandatory fields):

- **Publications Listing**

The system will automatically choose the University Jobs Site (jobs.ed.ac.uk). There are another 3 fields for further publications if required.

(If you choose the Scotsman the advert will also automatically be placed in the Evening News or the Scotland on Sunday. You cannot advertise singly in the Scotsman or Scotland on Sunday. If you want to advertise singly in the Evening News please select Ed Evening News from the list.)

Note: If the publication you require is not listed you can enter a new medium in the final box of the publications listing section.

- **Charging for External Advertising**

Percentage for External Advertising\* - (enter the percentage of the advertising costs to be charged to a Cost Centre, Account Code and Job Code. You may enter more than one line if the funding is split (i.e. 50%-50%, 50%-25%-25%) as long as the total is 100%)

Cost Centre\* - (i.e. 424000)

Account Code\* - (i.e. 2140)

Job Code\* - (i.e. S00001)

The system will check that each part of the costing is a valid code. It will also check that the job code can be used with the account code quoted e.g. job code R12345 account code must begin with a 3 i.e. 3012.

**This section is mandatory for all non-university funded positions or if you request more than one publication (excluding the University Jobs Site and Warwick Web).**

- **Comments** – (Allows the Originator to inform HR of any further information required for advertising)
- **Closing date for applications\*** – (Choose from drop down box either 2, 3 or 4 weeks. This will be set from the date of placement in the publication)
- **Name of person to whom applications will be sent\*** - (Please use full name)
- **Full Work Address\*** - (Of person to whom applications will be sent)
- **Email Address\*** - (Of person to whom applications will be sent)
- **Telephone Number\*** - (Of person to whom applications will be sent)





A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. **Once you click on CONTINUE you cannot go back and make any amendments.**

https://arthur.mis.ed.ac.uk:9443/pls/HR11TEST/UOE\_ATR\_ADVERT\_SCREEN5.confirm\_advertising\_detail - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Confirm Advertising Details

Please check that the following details are correct before pressing Continue:

|   |                           |
|---|---------------------------|
| Publication 1                                     | University Jobs Site      |
| Publication 2                                     | www.jobs.ac.uk            |
| Publication 3                                     | Scotsman                  |
| Publication 4                                     | Times Higher Ed Supplemen |
| Cost Percentage 1                                 | 100                       |
| Cost Centre 1                                     | 424000                    |
| A/C Code 1  | 2140                      |
| Job Code 1  | S00001                    |
| Closing Date (weeks after publication):           | 3                         |
| Name of person to whom applications will be sent: | A N Other                 |
| Address Line 1:                                   | Neuroscience              |
| Address Line 2:                                   | George Square             |
| Address Line 3:                                   |                           |
| Address Line 4:                                   |                           |
| Email Address:                                    | a.n.other@ed.ac.uk        |
| Telephone Number:                                 | 01316500000               |

[Continue](#) [Back to previous screen](#)

Click on CONTINUE to move to the next screen.

A screen will then appear (see picture below) confirming the advertising details have been saved.



Click on SUBMIT FOR APPROVAL.

Once you have submitted this you will receive notifications at different stages of the process ([see Section 5](#)).

**NOTE: Adverts cannot be placed in publications until HR has received both the advert and further particulars by email attachment.**

## Option 2 - Advertising details known and not externally advertised (internal candidates only)

Complete the following fields (\*mandatory fields):

- Publications Listing – (The system will automatically choose the University Jobs Site (jobs.ed.ac.uk) for all internal candidates only positions)
- Closing date for applications\* – (Choose from drop down box of either 2, 3 or 4 weeks)
- Name of person to whom applications will be sent\* - (Please use full name)
- Full Work Address\* - (Of person to whom applications will be sent)
- Email Address\* - (Of person to whom applications will be sent)
- Telephone Number\* - (Of person to whom applications will be sent)

The screenshot shows a web browser window titled "https://arthur.mis.ed.ac.uk:9443/pls/HR111TEST/UOE\_ATR\_WORKFLOW.ENTER\_ADVERT\_DETAILS - Microsoft Internet Explorer". The page has a blue header with the University of Edinburgh logo and the title "Advertising Details". Below the header, the text "Please enter Advertising Details:" is displayed. The form contains the following fields:

- Publications Listing: A text box containing "University Jobs Site".
- Closing date for applications: A dropdown menu showing "3" with the text "weeks after publication date".
- Name of person to whom applications will be sent: A text box containing "A N Other".
- Full Work Address: Three stacked text boxes containing "Neuroscience", "George Square", and an empty box.
- Email Address: A text box containing "a.n.other@ed.ac.uk".
- Telephone Number: A text box containing "0131 650 0000".

Below the form, a note states: "Note: Fields marked with an asterisk (\*) are mandatory". At the bottom of the form is a "Continue" button. The browser's status bar at the bottom shows "Done", "Internet", and the time "14:49".

Click on CONTINUE to move to the next screen

A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. **Once you click on CONTINUE you cannot go back and make any amendments.**

https://arthur.mis.ed.ac.uk:9443/pls/HR11TEST/UOE\_ATR\_ADVERT\_SCREEN5.confirm\_advertising\_detail - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Confirm Advertising Details

Please check that the following details are correct before pressing Continue:

|   |                      |
|---|----------------------|
| Publication 1                                     | University Jobs Site |
| Closing Date (weeks after publication):           | 3                    |
| Name of person to whom applications will be sent: | A N Other            |
| Address Line 1:                                   | Neuroscience         |
| Address Line 2:                                   | George Square        |
| Address Line 3:                                   |                      |
| Address Line 4:                                   |                      |
| Email Address:                                    | a.n.other@ed.ac.uk   |
| Telephone Number:                                 | 0131 650 0000        |

[Continue](#) [Back to previous screen](#)

Done Internet  
Start Inb... htt... US... Or... htt... 14:49

Click on CONTINUE to move to the next screen.

A screen will then appear (see picture below) confirming the advertising details have been saved.



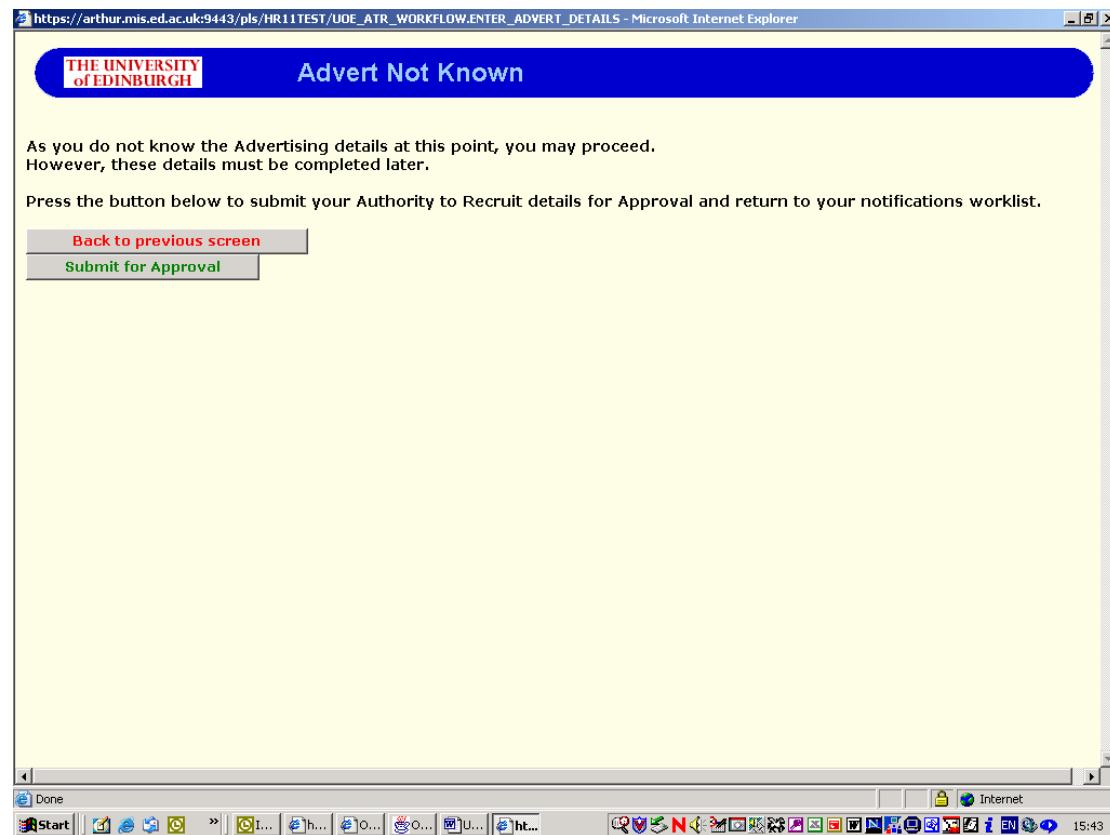
Click on SUBMIT FOR APPROVAL.

Once you have submitted this you will receive notifications at different stages of the process ([see Section 5](#)).

**NOTE: Adverts cannot be placed in publications until HR has received both the advert and further particulars by email attachment.**

### Options 3 & 4 – Advertising details not known and either externally or not externally advertised

As the advertising details are not known at this point the ATR will go for approval.



Click on SUBMIT FOR APPROVAL.

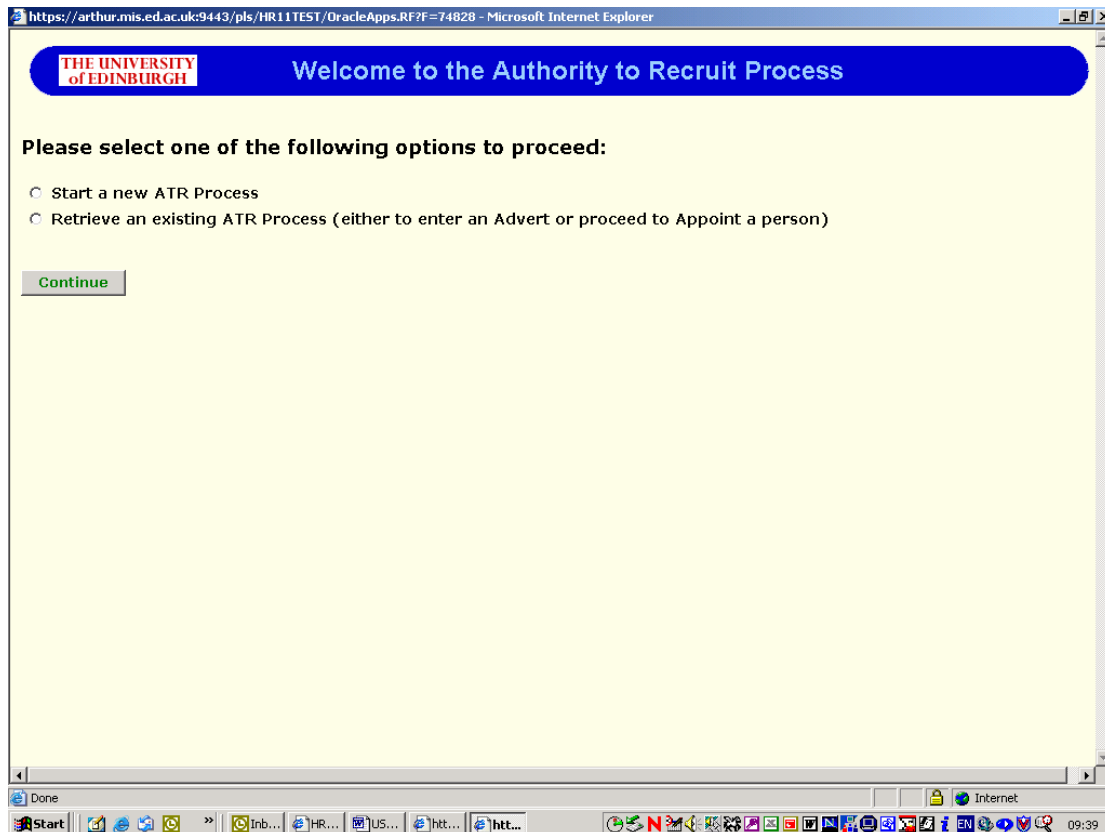
Once you have submitted this you will then receive notifications at different stages of the process ([see Section 5](#)).

You can then proceed to add advertising details when known.

## SECTION 4 – RETRIEVING APPROVED ATR FOR CHANGES

If you are not already logged into the system follow the instructions on [pages 2, 3 and 4](#).

A screen will appear (see picture below)



There are 2 options:

To start a new ATR Process, see [Section 2](#).

To retrieve an existing ATR Process, the following pages will show you how to complete this.

Click in the circle next to the relevant option then click on CONTINUE to move to the next screen.



The following screen appears (see picture below)

The screenshot shows a web browser window titled "Microsoft Internet Explorer" with the address bar displaying "https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\_ATR\_WORKFLOW.START\_ATR\_PROCESS". The page content is titled "Retrieve ATR" and includes the University of Edinburgh logo. Below the title, it says "Please enter the Authority to Recruit number and Organisation:". There are two input fields: "ATR Number \*" with the value "CSG6893" and "Organisation \*" with the value "Human Resources". A "Continue" button is located below the input fields. The browser's taskbar at the bottom shows the Start button and several open applications, including Internet Explorer, Or..., Co..., BU..., In..., Mic..., US..., and EN.

Enter the relevant ATR Number and Organisation (as provided on the ATR Details Saved screen, [see page 11](#))

Click on CONTINUE to move to the next screen.

The following screen appears (see example below) requesting further info:

https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\_ATR\_WORKFLOW.VIEW\_ATR\_DETAILS - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** **ATR Approval Details**

**Approved ATR Details**

ATR Details:

|                         |                                 |
|-------------------------|---------------------------------|
| ATR Number              | CSG6893                         |
| College / Support Group | Corporate Services Group        |
| School / Planning Unit  | Human Resources Planning Unit   |
| Organisation            | Human Resources                 |
| Post                    | New                             |
| Grading Approval Number | ABC123                          |
| Job Title               | HR Assistant                    |
| Max Grade for Post      | UE04                            |
| Earliest Start Date     | 01-AUG-2006                     |
| Latest Start Date       | 01-FEB-2007                     |
| Employment Category     | Fixed Term                      |
| FT Duration             | 1 Years                         |
| FT Reason               | Restricted/Time Limited Funding |
| Full / Part Time        | Full Time                       |
| Max Number of Hours     | 35                              |
| Disclosure Scotland     | Disclosure Not Required         |

ATR Salary Charging Details:

| %   | Cost Centre A/C Code | Job Code | Funding Source |
|-----|----------------------|----------|----------------|
| 100 | 424CHR               | 2140     | S00001         |

https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\_ATR\_WORKFLOW.VIEW\_ATR\_DETAILS - Microsoft Internet Explorer

|                         |                                 |
|-------------------------|---------------------------------|
| Organisation            | Human Resources                 |
| Post                    | New                             |
| Grading Approval Number | ABC123                          |
| Job Title               | HR Assistant                    |
| Max Grade for Post      | UE04                            |
| Earliest Start Date     | 01-AUG-2006                     |
| Latest Start Date       | 01-FEB-2007                     |
| Employment Category     | Fixed Term                      |
| FT Duration             | 1 Years                         |
| FT Reason               | Restricted/Time Limited Funding |
| Full / Part Time        | Full Time                       |
| Max Number of Hours     | 35                              |
| Disclosure Scotland     | Disclosure Not Required         |

ATR Salary Charging Details:

| %   | Cost Centre A/C Code | Job Code | Funding Source |
|-----|----------------------|----------|----------------|
| 100 | 424CHR               | 2140     | S00001         |

There are no Advert details for this ATR Number.

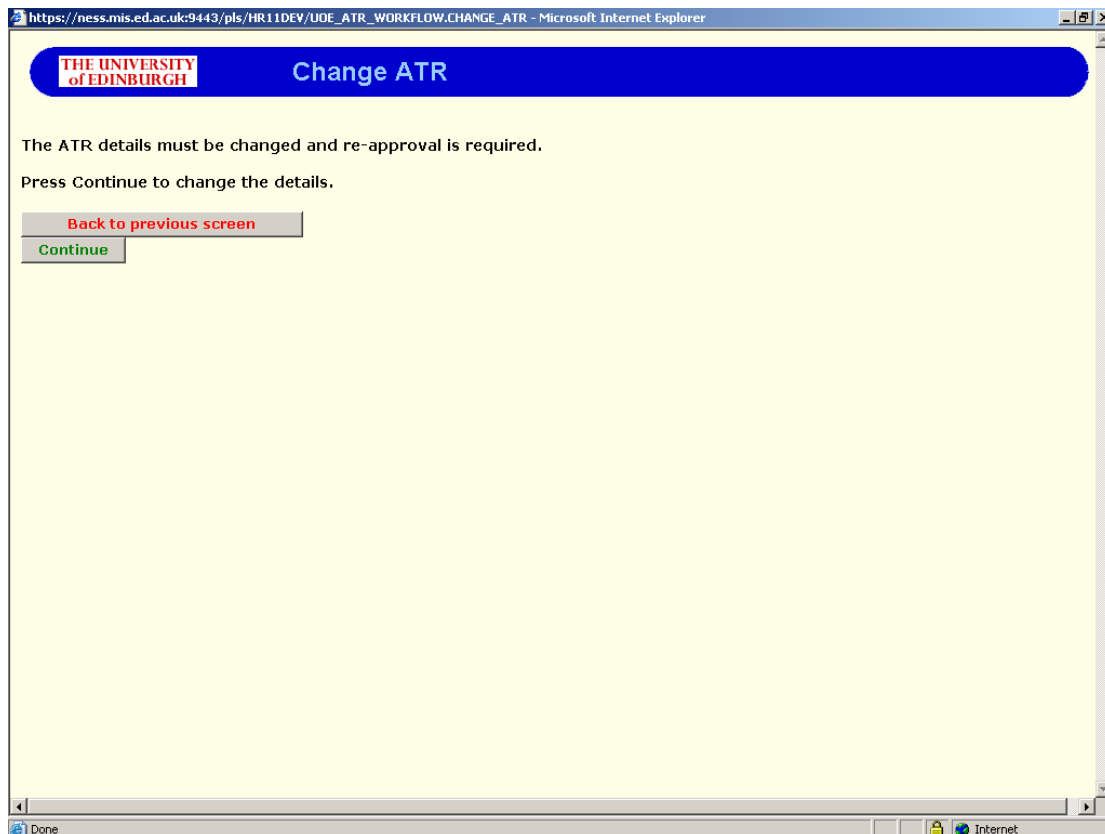
Please answer the following questions.

Do you wish to change any of the ATR Details above?

Is the Grade still UE04 as approved or is it higher?

If you wish to make changes to the ATR before appointing answer 'yes' to the first question and 'higher' or 'same or less' (which ever is applicable) to the second question. Click on CONTINUE.

The following screen will appear



Click on CONTINUE to make changes.

Amend the relevant fields as required (see [pages 6-10](#)) then re-submit for approval. The ATR will then go through Approval, 2<sup>nd</sup> Approval and be returned to the Originator for appointment.

## SECTION 5 – NOTIFICATIONS

### ATR Notifications:

An example of what will appear in your work list is below

The screenshot shows a web browser window titled "Oracle Workflow: Notifications - Microsoft Internet Explorer". The address bar displays a URL from shin.mis.ed.ac.uk. The page content is titled "ORACLE UOE ATR Process" and includes navigation links for Home, Logout, Preferences, and Help. A "Worklist" section is visible, with a "View" dropdown set to "All Notifications" and a "Go" button. Below this, there are "Select Notifications: (Open)" and "Select All | Select None" options. A table lists various notifications with columns for "Select From", "Type", "Subject", "Sent", "Due", and "Status". The table contains 16 rows of notifications, mostly from "UOE ATR Process" and "UOE New Appointments Process", with subjects like "Ready to Appoint for CSG6893", "ATR Approved Message", "UOE Contract Generated", and "Notify Originator Recruitment Started for SAS6882". The "Sent" dates are mostly from June 2006, except for one from December 2005. The "Status" column shows "Open" for the first two and "Closed" for the rest. At the bottom, there is a "Select Notifications: (Open)" button and a checkbox for "TIP Variation Rules - Redirect or auto-respond to notifications". The Windows taskbar at the bottom shows the start button and several open applications.

| Select From              | Type                         | Subject   | Sent        | Due | Status |
|--------------------------|------------------------------|---|-------------|-----|--------|
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">Ready to Appoint for CSG6893</a>                      | 23-Jun-2006 |     | Open   |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Approved Message</a>                              | 23-Jun-2006 |     | Open   |
| <input type="checkbox"/> | UOE Transfers Process        | <a href="#">UOE Contract Generated</a>                            | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE Transfers Process        | <a href="#">UOE Appointment Approved for Kilgour, MISS Rhea</a>   | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE Transfers Process        | <a href="#">UOE Notification for Screen Entry</a>                 | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">Ready to Appoint for CSG6887</a>                      | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Approved Message</a>                              | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Contract Generated</a>                            | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Appointment Approved for McCartney, MR. Paul</a>  | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">Ready to Appoint for MVM6885</a>                      | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Approved Message</a>                              | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Notification for Screen Entry</a>                 | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">Notify Originator Recruitment Started for SAS6882</a> | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">Ready to Appoint for CSG6884</a>                      | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Approved Message</a>                              | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Approved Message</a>                              | 19-Jun-2006 |     | Closed |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Re-Approved Message</a>                           | 01-Dec-2005 |     | Closed |

To view the ATR notifications click on the link within the subject column.

Examples of both the ATR Approved Message and Notify Originator Recruitment are shown on the following pages.

## ATR Approved Message

The screenshot shows a web browser window titled "Notification Details - Microsoft Internet Explorer". The address bar displays a URL from "shin.mis.ed.ac.uk". The page header is "ORACLE UOE ATR Process" with links for Home, Logout, Preferences, and Help. A green information box states "This notification does not require a response." The main heading is "ATR Approved Message". The message content includes: "To Kilgallon, Deborah", "Sent 23-Jun-2006 12:15:54", "ID 126156", "Dear Kilgallon, Deborah.", "The following ATR has been approved:", "ATR Number = CSG6893.", "Regards,", "Brogan, Kevin and CHECKERCSCG.", and a "Return to Worklist" link. There is a checkbox for "Display next notification after my response" and an "OK" button. The footer contains "Copyright 2000-2005 Oracle Corporation. All rights reserved." and navigation links.

## Notify Originator Recruitment Started (with advertising details)

The screenshot shows a web browser window titled "Notification Details - Microsoft Internet Explorer". The address bar displays a URL from "shin.mis.ed.ac.uk". The page header is "ORACLE Workflow Administrator Web Applications" with links for Home, Logout, Preferences, and Help. A green information box states "This notification does not require a response." The main heading is "Notify Originator Recruitment Started for MVM6894.". The message content includes: "To Kilgallon, Deborah", "Sent 23-Jun-2006 12:28:34", "ID 126162", "Dear Kilgallon, Deborah.", "The Recruitment Process has started for:", "ATR Number = MVM6894.", "The Vacancy Reference Number is: 3001234.", "You will shortly receive further details from Recruitment.", "When you have selected a candidate to appoint, go to the ATR Process menu and retrieve the ATR by entering the ATR Number above.", and a "Return to Worklist" link. There is an "OK" button. The footer contains "Copyright 2000-2005 Oracle Corporation. All rights reserved." and navigation links.

## Appointment Notifications:

An example of what will appear in your work list is below

Oracle Workflow Notifications - Microsoft Internet Explorer

Address: [https://ness.mis.ed.ac.uk:9443/OA\\_HTML/OA.jsp?OAFunc=WF\\_WORKLIST&ntView=1&dbc=ness\\_hr11dev&transactionid=402703976](https://ness.mis.ed.ac.uk:9443/OA_HTML/OA.jsp?OAFunc=WF_WORKLIST&ntView=1&dbc=ness_hr11dev&transactionid=402703976)

ORACLE Workflow

Home Logout Preferences Help

### Notifications

Select one or more notifications from the list and Open or Reassign them using the appropriate buttons. You may also click on the notification subject to open a particular notification.

View:

Select All | Select None

| Select From              | Type                         | Subject  | Sent        | Due         |
|--------------------------|------------------------------|--|-------------|-------------|
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Notify Employee Number for McLaren, Kim.</a>     | 09-Aug-2004 | 12-Aug-2004 |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Appointment Approved for McLaren, MISS Kim.</a>  | 09-Aug-2004 |             |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Approval Message for SCE147.</a>                 | 19-Jul-2004 | 24-Jul-2004 |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Approval Message for SCE146.</a>                 | 19-Jul-2004 | 24-Jul-2004 |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Notify Employee Number for Scotsman, Kim.</a>    | 16-Jul-2004 | 19-Jul-2004 |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Appointment Approved for Scotsman, MISS Kim.</a> | 16-Jul-2004 |             |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Notify Employee Number for Lemon, John.</a>      | 06-Jul-2004 | 09-Jul-2004 |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Appointment Approved for Lemon, MR John.</a>     | 06-Jul-2004 |             |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Notify Employee Number for Niceday, Bill.</a>    | 06-Jul-2004 | 09-Jul-2004 |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Appointment Approved for Niceday, MR Bill.</a>   | 06-Jul-2004 |             |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Notify Employee Number for Kimber, Kim.</a>      | 06-Jul-2004 | 09-Jul-2004 |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Appointment Approved for Kimber, MISS Kim.</a>   | 06-Jul-2004 |             |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Request Approval for Niceday, MISS Andrea.</a>   | 06-Jul-2004 | 11-Jul-2004 |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Request Approval for McDonald, DR Sharon.</a>    | 23-Jun-2004 | 28-Jun-2004 |
| <input type="checkbox"/> | UOE ATR Process              | <a href="#">ATR Approval Message for SCE121.</a>                 | 23-Jun-2004 | 28-Jun-2004 |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Contract Accepted</a>                            | 03-Jun-2004 |             |
| <input type="checkbox"/> | UOE New Appointments Process | <a href="#">UOE Contract Generated</a>                           | 03-Jun-2004 |             |

To view the Appointment notifications click on the link within the subject column.

Examples of both the UOE Contract Accepted or UOE Contract Generated screens are shown on the following pages.

## UOE Contract Generated

The screenshot shows a web browser window titled "https://shin.mis.ed.ac.uk:8179 - Notification Details - Microsoft Internet Explorer". The page header is "ORACLE UOE ATR Process" with links for Home, Logout, Preferences, and Help. A green bar at the top contains an information icon and the text "Information: This notification does not require a response." Below this, the title "UOE Contract Generated" is displayed with an "OK" button. The notification body includes: "To Kilgallon, Deborah", "Sent 23-Jun-2006 14:28:58", "ID 126168", and "Dear Kilgallon, Deborah and Priestley, Josie Marilyn (Josie),". It states: "A contract has been generated and forwarded to the following employee: Name = Bloggs, Joseph (Joe), Employee Number = 129196." It ends with "Regards, GENERATORMVM." and a "Return to Worklist" link. A checkbox "Display next notification after my response" is present. The footer contains "Copyright 2000-2005 Oracle Corporation. All rights reserved." and navigation links. The Windows taskbar at the bottom shows the Start button and several open applications.

https://shin.mis.ed.ac.uk:8179 - Notification Details - Microsoft Internet Explorer

ORACLE UOE ATR Process

Home Logout Preferences Help

**Information**

This notification does not require a response.

**UOE Contract Generated** OK

To Kilgallon, Deborah  
Sent 23-Jun-2006 14:28:58  
ID 126168  
Dear Kilgallon, Deborah and Priestley, Josie Marilyn (Josie),

A contract has been generated and forwarded to the following employee:

Name = Bloggs, Joseph (Joe),  
Employee Number = 129196.

Regards,  
GENERATORMVM.

[Return to Worklist](#) OK

☐ Display next notification after my response

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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## UOE Contract Accepted

The screenshot shows a web browser window titled "https://shin.mis.ed.ac.uk:8179 - Notification Details - Microsoft Internet Explorer". The page header is "ORACLE UOE ATR Process" with links for Home, Logout, Preferences, and Help. A green bar at the top contains an information icon and the text "Information: This notification does not require a response." Below this, the title "UOE Contract Accepted" is displayed with an "OK" button. The notification body includes: "To Kilgallon, Deborah", "Sent 23-Jun-2006 14:34:51", "ID 126173", and "Dear Kilgallon, Deborah and GENERATORMVM." It states: "The contract has been accepted by the following new employee: Name = Bloggs, Joseph (Joe), Employee Number = 129196." It ends with "Regards, NEWPAY." and a "Return to Worklist" link. A checkbox "Display next notification after my response" is present. The footer contains "Copyright 2000-2005 Oracle Corporation. All rights reserved." and navigation links. The Windows taskbar at the bottom shows the Start button and several open applications.

https://shin.mis.ed.ac.uk:8179 - Notification Details - Microsoft Internet Explorer

ORACLE UOE ATR Process

Home Logout Preferences Help

**Information**

This notification does not require a response.

**UOE Contract Accepted** OK

To Kilgallon, Deborah  
Sent 23-Jun-2006 14:34:51  
ID 126173  
Dear Kilgallon, Deborah and GENERATORMVM.

The contract has been accepted by the following new employee:

Name = Bloggs, Joseph (Joe),  
Employee Number = 129196.

Regards,  
NEWPAY.

[Return to Worklist](#) OK

☐ Display next notification after my response

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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There is one final notification that the originator can receive, this is from Payroll (NEWPAY) and is sent when Payroll have not received the contract back from the new employee asking you to chase it up.

Below is an example of what would appear in your work list.



Oracle Workflow: Notifications - Microsoft Internet Explorer

ORACLE UOE ATR Process

Home Logout Preferences Help

Worklist

View Open Notifications Go

Select Notifications: Open

Select All Select None

| Select From              | Type                         | Subject  | Sent        | Due         |
|--------------------------|------------------------------|--|-------------|-------------|
| <input type="checkbox"/> | UOE New Appointments Process | <u>UOE Contract Not Returned</u>                   | 23-Jun-2006 | 26-Jun-2006 |
| <input type="checkbox"/> | UOE New Appointments Process | UOE Appointment Approved for Bloggs, MR. Joseph.   | 23-Jun-2006 |             |
| <input type="checkbox"/> | UOE ATR Process              | Notify Originator Recruitment Started for MVM6894. | 23-Jun-2006 |             |
| <input type="checkbox"/> | UOE ATR Process              | ATR Approved Message                               | 23-Jun-2006 |             |
| <input type="checkbox"/> | UOE ATR Process              | Ready to Appoint for CSG6893.                      | 23-Jun-2006 |             |
| <input type="checkbox"/> | UOE ATR Process              | ATR Approved Message                               | 23-Jun-2006 |             |

TIP Vacation Rules - Redirect or auto-respond to notifications.

TIP Worklist Access - Specify which users can view and act upon your notifications.

Home Logout Preferences Help

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To view the notification click on the words highlighted in blue 'UOE Contract Not Returned'.



The following screen will appear with a note in the UOE Comments box from Payroll

The screenshot shows a web browser window titled "https://shin.mis.ed.ac.uk:8179 - Notification Details - Microsoft Internet Explorer". The page header includes the Oracle logo and "UOE ATR Process". Navigation links for "Home", "Logout", "Preferences", and "Help" are in the top right. The main heading is "UOE Contract Not Returned".

Metadata:

- To: Kilgallon, Deborah
- Sent: 23-Jun-2006 14:31:06
- Due: 26-Jun-2006 14:31:06
- ID: 126171
- Dear: [Kilgallon, Deborah](#)

Message body:

A contract has not as yet been returned for the following new employee:

Name = Bloggs, Joseph (Joe),  
Employee Number = 129196.

Can you please follow up on this and return a response as soon as possible.

Regards,

[NEWPAY](#)

**Action History**

| Num | Action Date          | Action | From               | To                 | Details |
|-----|----------------------|--------|--------------------|--------------------|---------|
| 1   | 23-JUN-2006 14:31:06 | Submit | Kilgallon, Deborah | Kilgallon, Deborah |         |

**Response**

UOE Comments: Can you please follow up as this person's contract has not yet been returned

Buttons: [Return Response](#) (top right), [Return Response](#) (bottom right)

[Return to Worklist](#)

☐ Display next notification after my response

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Footer navigation: [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

You should then chase up the contract with the New Employee and once you have an answer, go back into the notification remove the note in the UOE Comments from Payroll, type in your own reply (see example below) and press **Return Response**. This will send the notification back to payroll.

https://shin.mis.ed.ac.uk:8179 - Notification Details - Microsoft Internet Explorer

**ORACLE** UOE ATR Process [Home](#) [Logout](#) [Preferences](#) [Help](#)

---

**UOE Contract Not Returned** [Return Response](#)

To **Kilgallon, Deborah**  
 Sent 23-Jun-2006 14:31:06  
 Due 26-Jun-2006 14:31:06  
 ID 126171  
 Dear [Kilgallon, Deborah](#).

A contract has not as yet been returned for the following new employee:

Name = Bloggs, Joseph (Joe),  
 Employee Number = 129196.

Can you please follow up on this and return a response as soon as possible.

Regards,

[NEWPAY](#)  
**Action History**

| Num | Action Date          | Action | From               | To                 | Details |
|-----|----------------------|--------|--------------------|--------------------|---------|
| 1   | 23-JUN-2006 14:31:06 | Submit | Kilgallon, Deborah | Kilgallon, Deborah |         |

**Response**

UOE Comments

[Return to Worklist](#) [Return Response](#)

☐ Display next notification after my response

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

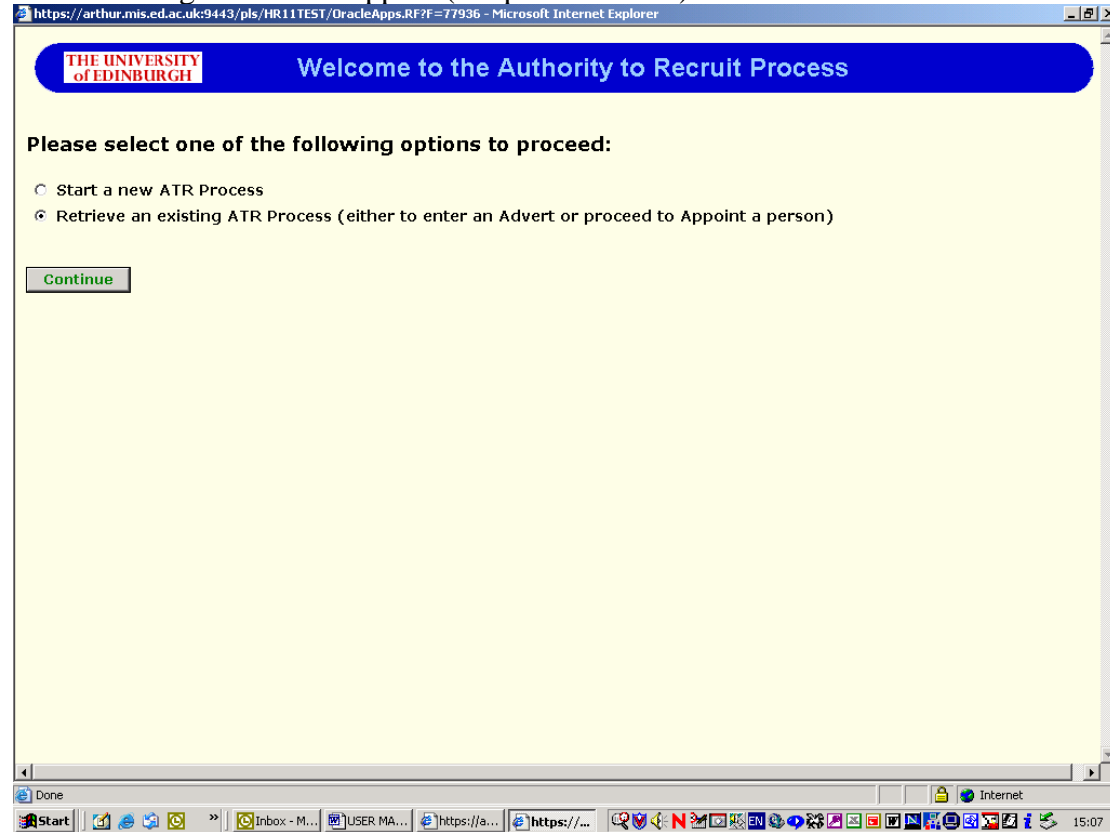
Copyright 2000-2005 Oracle Corporation. All rights reserved.

start | http... | http... | Ora... | http... | Co... | EU... | Inb... | http... | Micr... | USE... | http... | EN | 14:34

## SECTION 6 – RETRIEVING APPROVED ATR FOR APPOINTMENT

If you are not already logged into the system follow the instructions on [pages 2, 3 and 4](#).

The following screen will appear (see picture below)



Click in the circle next to retrieve an existing ATR Process.

Click on CONTINUE to move to the next screen.

The following screen appears (see picture below)

The screenshot shows a web browser window titled 'Microsoft Internet Explorer' with the address bar displaying 'https://arthur.mis.ed.ac.uk:9443/pls/HR111TEST/UOE\_ATR\_WORKFLOW.START\_ATR\_PROCESS'. The page content features a blue header bar with 'THE UNIVERSITY of EDINBURGH' on the left and 'Retrieve ATR' in the center. Below the header, a yellow background contains the instruction 'Please enter the Authority to Recruit number and Organisation:'. There are two input fields: 'ATR Number \*' with the value 'ACS689' and 'Organisation \*' with the value 'Registry'. A green 'Continue' button is located below the input fields. The browser's status bar at the bottom shows 'Done', 'Inbox...', 'USER ...', and 'https:...' tabs, along with a taskbar containing various application icons and a clock showing '15:07'.

Enter the relevant ATR Number and Organisation (as provided on the ATR Details Saved Screen see [page 11](#)).

Click on CONTINUE to move to the next screen.

The following screen will appear (see picture below)

https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\_ATR\_WORKFLOW.VIEW\_ATR\_DETAILS - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** **ATR Approval Details**

**Approved ATR Details**

ATR Details:

|                         |   |
|-------------------------|---|
| ATR Number              | MVM6894                                     |
| College / Support Group | College of Medicine and Veterinary Medicine |
| School / Planning Unit  | School of Biomedical Sciences               |
| Organisation            | Biomedical Sciences                         |
| Post                    | New   |
| Grading Approval Number | MVM123                                      |
| Job Title               | Professor                                   |
| Max Grade for Post      | UE09  |
| Earliest Start Date     | 01-AUG-2006                                 |
| Latest Start Date       | 01-FEB-2007                                 |
| Employment Category     | Permanent                                   |
| Full / Part Time        | Full Time                                   |
| Max Number of Hours     | 35  |
| Disclosure Scotland     | Disclosure Required                         |

ATR Salary Charging Details:

| %   | Cost Centre | A/C Code | Job Code | Funding Source          |
|-----|-------------|----------|----------|-------------------------|
| 100 | 424CHR      | 2140     | S00001   | University Of Edinburgh |

Full / Part Time: Full Time

Max Number of Hours: 35

Disclosure Scotland: Disclosure Required

ATR Salary Charging Details:

| %   | Cost Centre | A/C Code | Job Code | Funding Source          |
|-----|-------------|----------|----------|-------------------------|
| 100 | 424CHR      | 2140     | S00001   | University Of Edinburgh |

Advertising Details:

|                                      |                       |
|--------------------------------------|-----------------------|
| Publication Listing 1                | World Wide Web        |
| Number of Weeks                      | 3                     |
| Application Recipient                | A N Other             |
| Application Recipient Email          | a.n.other@ed.ac.uk    |
| Application Recipient Phone          | 01316501234           |
| Application Recipient Address Line 1 | Charles Stewart House |
| Application Recipient Address Line 2 | Chambers Street       |
| Application Recipient Address Line 3 | Edinburgh             |

Advertising Costing Details:

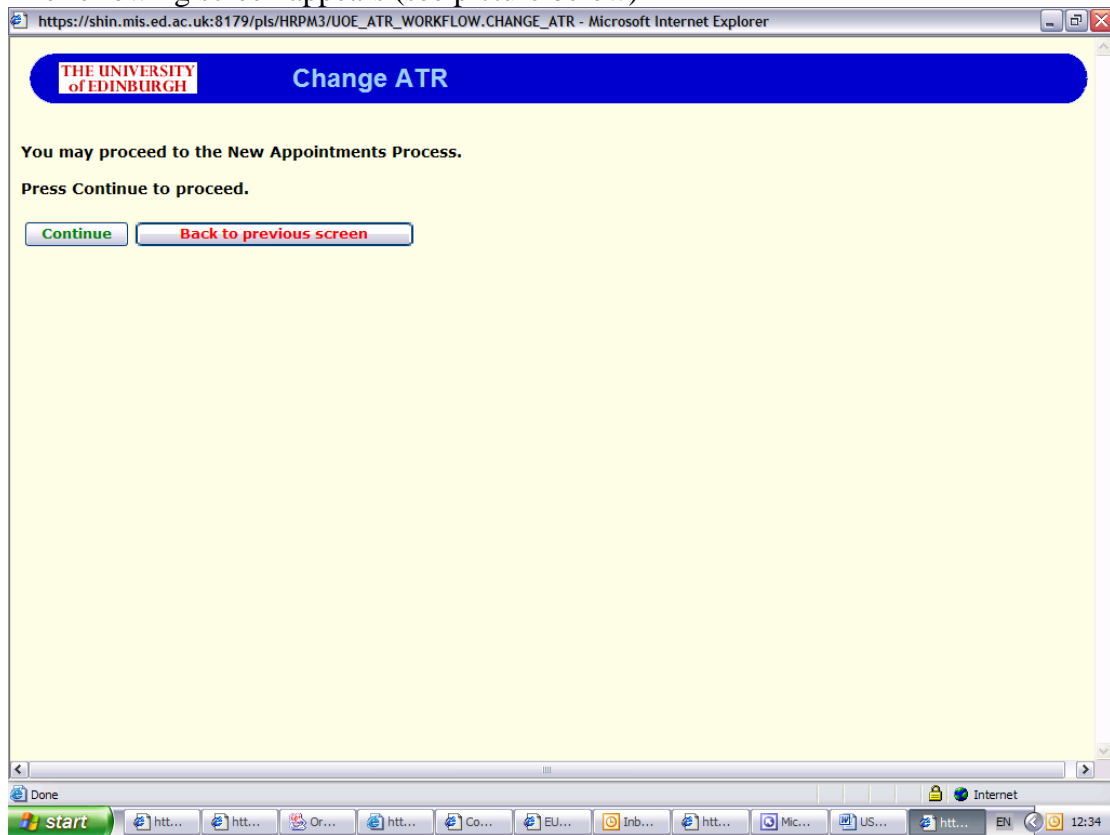
| % | Cost Centre | A/C Code | Job Code |
|---|-------------|----------|----------|
|   |             |          |          |

Please answer the following questions.

Do you wish to change any of the ATR Details above?

Is the Grade still UE09 as approved or is it higher?

If you have no changes to make and wish to continue to appoint using this ATR answer 'no' the first question and then 'same or less' to the second question.  
The following screen appears (see picture below)



Click on CONTINUE to move to the next screen.

A box will appear (see picture below) asking you to choose which of the following relates to the appointment you are dealing with (click on the relevant one, the system defaults to All Other Appointments):



The screenshot shows a Microsoft Internet Explorer window with the address bar displaying [https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\\_NEW\\_APPOINTMENTS\\_WORKFLOW.NEW\\_APPOINT\\_INTRO](https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE_NEW_APPOINTMENTS_WORKFLOW.NEW_APPOINT_INTRO). The page header features the University of Edinburgh logo and the title "Welcome to the New Appointments Process". The main content area has a yellow background and contains the text "Please choose from the following options:" followed by four radio button options: "Term-time only", "Professor", "Vet Scholar", and "All Other Appointments". The "All Other Appointments" option is selected. Below the options is a green "Continue" button. The browser's taskbar at the bottom shows the Start button and several open web browser tabs.

Click on CONTINUE to move to the next screen

If you have selected Term-time only, Professor or Vet Scholar the following message will appear: "This is an exceptional New Start. Please appoint this person external to the system, using the manual process in place."

If you selected 'All Other Appointments' then the following screen will appear (see picture below)

https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\_NEW\_APPOINTMENTS\_WORKFLOW.QUERY\_PERSON - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Query Person Details

**Please enter the Following:**

Last Name \*  First Name   
Date of Birth \*  Start Date \*   
College/Support Group to Appoint at \*

Note: Fields marked with an asterisk (\*) are mandatory

requesting you to complete the fields with the following information:

- Last Name\* - (Initial Capitals i.e. Bloggs)
- First Name - (Initial Capitals i.e. Joseph)
- Date of Birth\* - (dd/mm/yyyy or dd/mm/yy)
- Start Date\* - (dd/mm/yyyy)
- College/Support Group to Appoint at\*

(\*Mandatory Fields)

Click on CONTINUE to move to the next screen.

**If the person exists** on Oracle they will be 1 of 4 things

- An existing employee on the Main Payroll
- An existing employee on the Casual Payroll
- An ex-employee with a final process date
- An ex-employee without a final process date

The following is how each of these should be dealt with



## An existing employee on the Main Payroll

The screen will return with the following message

https://ness.mis.ed.ac.uk:9443/pls/HR11DEV/UOE\_NEW\_APPOINTMENTS\_WORKFLOW.CHECK\_PERSON - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Query result from HR System

You entered:

|                                      |   |             |            |
|--------------------------------------|---|-------------|------------|
| Last Name:                           | Duck  | First Name: | Michael    |
| Date of Birth:                       | 26-Jun-1948                                 | Start Date: | 1-Nov-2004 |
| College/Support Group to appoint at: | College of Medicine and Veterinary Medicine |             |            |

A match has been found on the HR system.

Details retrieved from HR are:

| Employee Number   | Employee Full Name | NI Number | Person Type | Select:                          |
|-------------------|--------------------|-----------|-------------|----------------------------------|
| 120042            | Duck, Michael      |           | Employee    | <input checked="" type="radio"/> |
| None of the Above |                    |           |             | <input type="radio"/>            |

If you are uncertain of the option to select, please contact HR Support.

[Continue](#) [Back to previous screen](#)

If this is the person you wish to hire then click in the circle in the 'please select' column and click on CONTINUE.

The following message will then appear

https://ness.mis.ed.ac.uk:9443/pls/HR11DEV/UOE\_NEW\_APPOINTMENTS\_WORKFLOW.CHECK\_TYPE - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Appointee Selection

The person you have selected is a Current Employee on the Main Payroll. If you appoint this person, the system will perform a Transfer. Please answer the question below and press the Submit Workflow button to proceed to the next screen to enter the New Appointment Details.

Is this to be the Appointee's one and only position within the University? Please Select...

*If unsure whether this is the Appointee's one and only position, please close this screen (click on Cancel) and check this before retrieving the ATR again and continuing with the appointment.*

[Submit Workflow](#) [Back to previous screen](#) [Cancel](#)

You should now answer the question (by selecting Yes or No from the pick list) 'Is this to be the Appointee's one and only position within the University'.

**IT IS IMPORTANT THAT THIS QUESTION IS ANSWERED CORRECTLY THEREFORE IF YOU ARE UNSURE THIS IS THE APPOINTEE'S ONE AND ONLY POSITION PLEASE CLOSE THIS SCREEN (CLICK ON CANCEL BUTTON) AND CHECK (EITHER WITH THE EMPLOYEE OR YOUR HR TEAM) BEFORE RETRIEVING THE ATR AGAIN AND CONTINUING WITH THE APPOINTMENT.**

Once you have answered the question (YES or NO from pick list) click on the Submit Workflow button.

Please then follow instructions from [page 46](#) of this manual

### **An existing employee on the Casual Payroll**

The screen will return with the following message

Query result from HR System - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Query result from HR System

You entered:

|                        |   |             |            |
|------------------------|---|-------------|------------|
| Last Name:             | Smith                                       | First Name: | David      |
| Date of Birth:         | 19-Jun-1965                                 | Start Date: | 1-Apr-2003 |
| College to appoint at: | College of Medicine and Veterinary Medicine |             |            |

This person does already exist on the HR system.  
This is a Rehire.

Details retrieved from HR are:

| Employee Number   | Employee Full Name | NI Number | Person Type | Please Select:        |
|-------------------|--------------------|-----------|-------------|-----------------------|
| 114815            | Smith, Dr David    | NH021893A | Employee    | <input type="radio"/> |
| None of the Above |                    |           |             | <input type="radio"/> |

If you are uncertain of the option to select, please contact HR Support.

Back to previous screen  
Continue

If this is the person you wish to hire then click in the circle in the 'please select' column and click on CONTINUE.

The following message will then appear

## An ex-employee without a final process date

The screen will return with the following message

Query result from HR System - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Query result from HR System

You entered:

|                        |   |             |            |
|------------------------|---|-------------|------------|
| Last Name:             | Kimber                                      | First Name: | Walter     |
| Date of Birth:         | 1-Aug-1948                                  | Start Date: | 1-Apr-2003 |
| College to appoint at: | College of Medicine and Veterinary Medicine |             |            |

This person does already exist on the HR system.  
This is a Rehire.

Details retrieved from HR are:

| Employee Number   | Employee Full Name | NI Number | Person Type | Please Select:        |
|-------------------|--------------------|-----------|-------------|-----------------------|
| 116555            | Kimber, MR. Walter | TN010848M | Ex-employee | <input type="radio"/> |
| None of the Above |                    |           |             | <input type="radio"/> |

If you are uncertain of the option to select, please contact HR Support.

Back to previous screen

Continue

Return to Home Page

If this is the person you wish to hire then click in the circle in the 'please select' column and click on CONTINUE.

The following message will then appear

Query result from HR System - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Query result from HR System

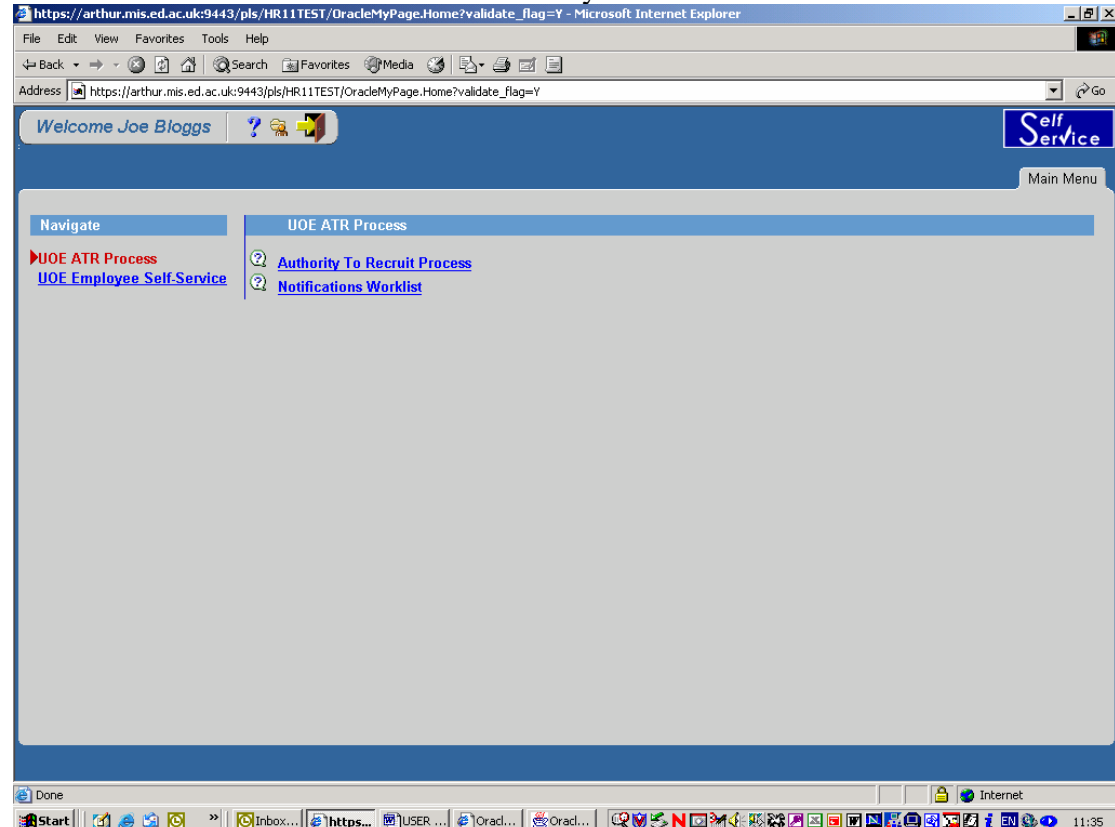
This rehire needs to be end-dated in the system.  
Please press the Submit Workflow button below and wait until you receive a notification to proceed.

Back to previous screen

Submit Workflow

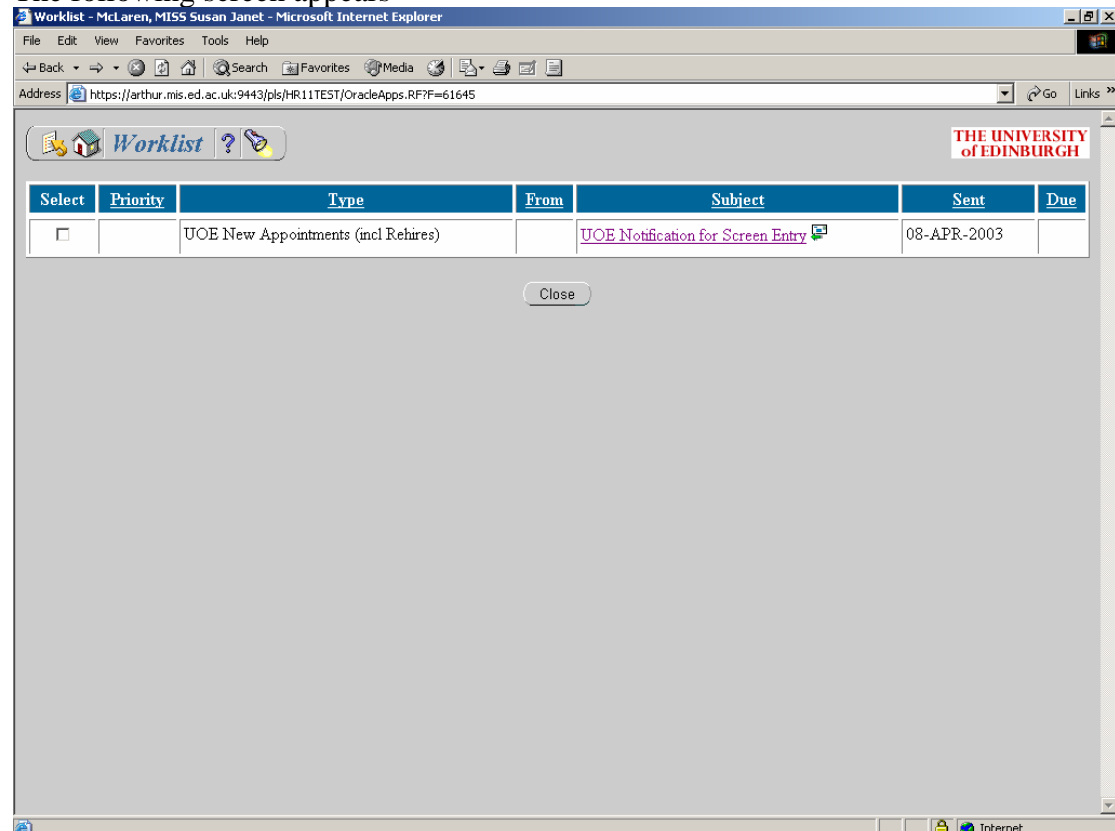
Done

Click on Submit Workflow. Then wait until you receive a notification to continue.



Once you receive the notification click on Notifications Worklist (see example of screen above) in your UOE ATR Process Screen.

The following screen appears



Click on UOE Notification of Screen Entry and follow instruction from [page 46+](#)

### An ex-employee with a final process date

The screen will return with the following message

Query result from HR System - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Query result from HR System

You entered:

|                        |   |             |            |
|------------------------|---|-------------|------------|
| Last Name:             | Kimber                                      | First Name: | Anne       |
| Date of Birth:         | 26-Jun-1948                                 | Start Date: | 1-Apr-2003 |
| College to appoint at: | College of Medicine and Veterinary Medicine |             |            |

This person does already exist on the HR system.  
This is a Rehire.

Details retrieved from HR are:

| Employee Number   | Employee Full Name | NI Number | Person Type | Please Select:        |
|-------------------|--------------------|-----------|-------------|-----------------------|
| 116553            | Kimber, MRS. Anne  | TN260648F | Ex-employee | <input type="radio"/> |
| None of the Above |                    |           |             | <input type="radio"/> |

If you are uncertain of the option to select, please contact HR Support.

Back to previous screen

Continue

If this is the person you wish to hire then click in the circle in the 'please select' column and click on CONTINUE.

The following message will then appear

Query result from HR System - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Query result from HR System

You may proceed to rehire this person by going to the next screen to enter the New Appointment Details.  
Please press the Submit Workflow button below.

Back to previous screen

Submit Workflow

Click on Submit Workflow and follow instructions from [Page 46](#)

**If the person does not exist** on Oracle a screen will appear (see picture below) confirming the details you entered and show the following message “This person does not already exist on the HR system. This is a brand New Start. You may proceed by pressing the Submit Workflow button below”

https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\_NEW\_APPOINTMENTS\_WORKFLOW.CHECK\_PERSON - Microsoft Internet Explorer

**THE UNIVERSITY of EDINBURGH** Query result from HR System

You entered:

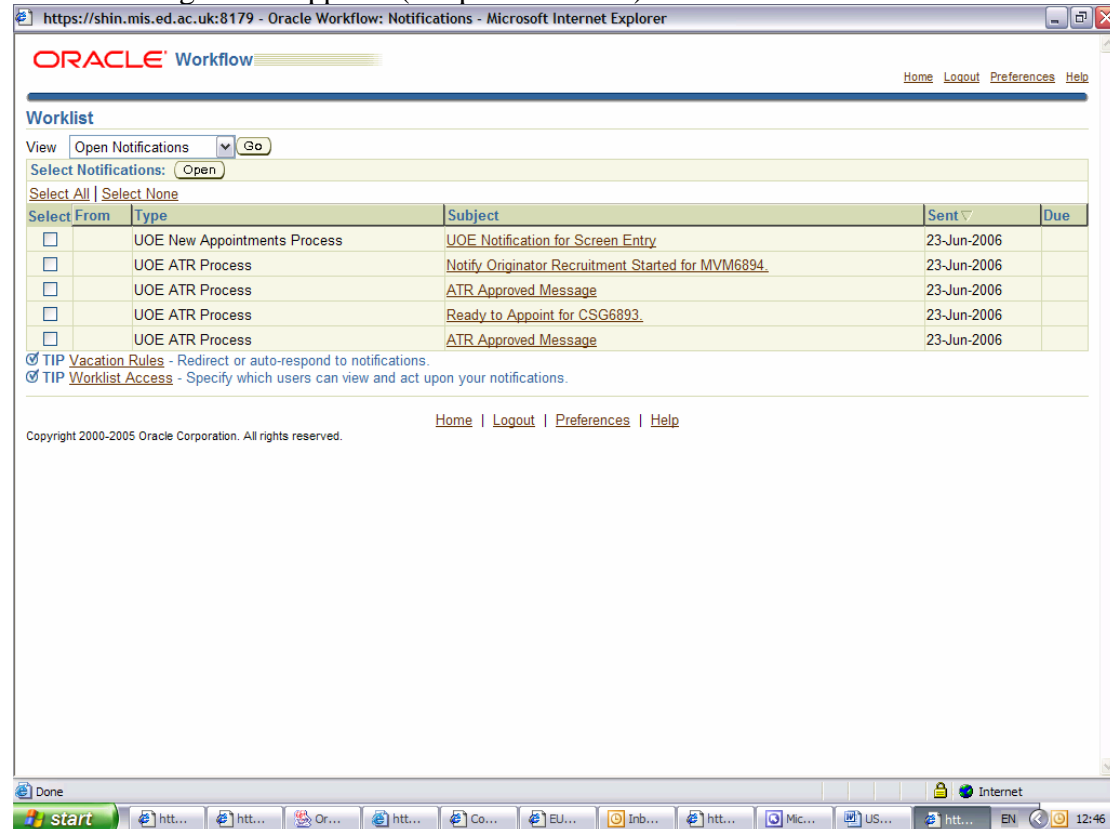
|                                      |   |             |            |
|--------------------------------------|---|-------------|------------|
| Last Name:                           | Bloggs                                      | First Name: | Joseph     |
| Date of Birth:                       | 1-Jun-1976                                  | Start Date: | 7-Aug-2006 |
| College/Support Group to appoint at: | College of Medicine and Veterinary Medicine |             |            |

This person does not already exist on the HR system.  
This is a Brand New Start.

You may proceed by pressing the Submit Workflow button below.

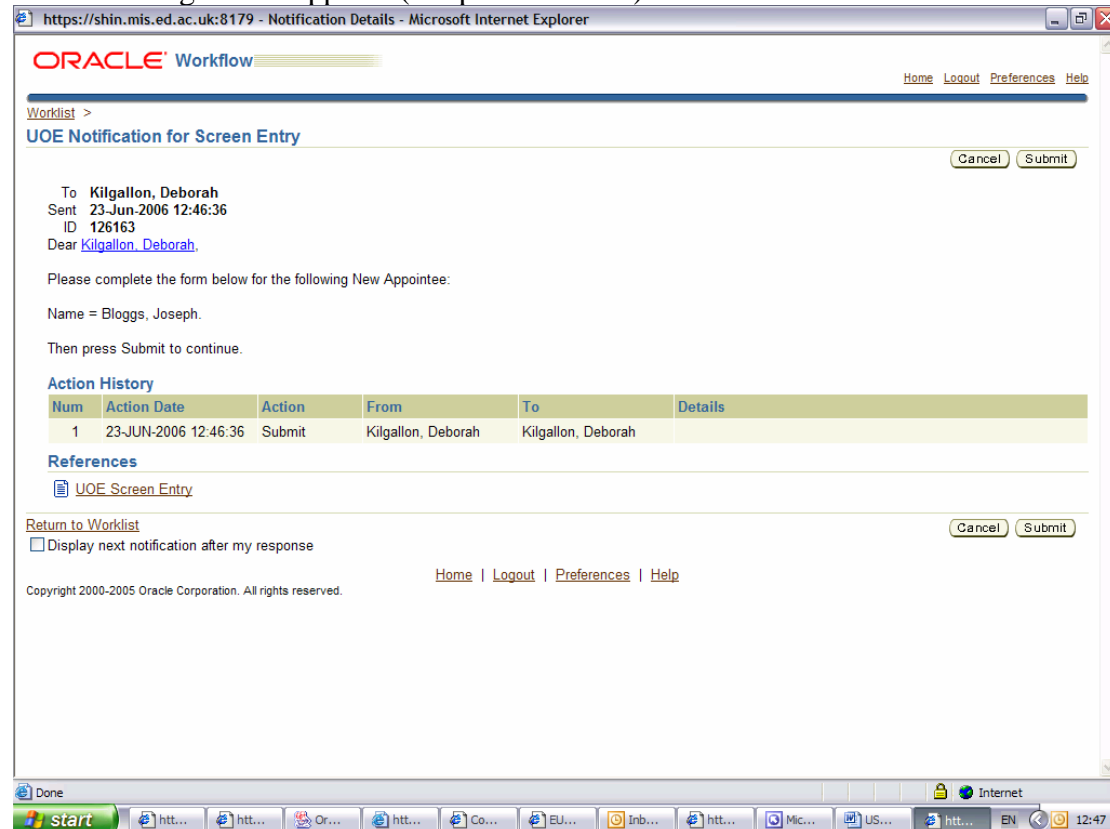
[Submit Workflow](#) [Back to previous screen](#)

The following screen appears (see picture below)



Click on UOE Notification for Screen Entry

The following screen appears (see picture below)



As an Originator you should Click once on the **small document icon** above the wording UOE Screen Entry

The screen's, which now follow, are split into 6 sections

- Basic Personal Details
- Address Details
- Other Person Details
- Appointment Details
- Costing Allowance Details
- Additional Contract Details

These should be completed as follows: (if the person you are appointing is a Transfer or Rehire the detail on the Basic Personal Details Screen will already be completed for you)

### **BASIC PERSONAL DETAILS SCREEN (see picture below)**

- Last name\* - (Initial Capitals i.e. Blogg)
- First name\* - (Initial Capitals i.e. Jo)
- Title\*
- Middle Name - (Initial Capitals i.e. John)
- Preferred Name - (Initial Capitals i.e. John)
- Date of Birth\* - (dd/mm/yyyy)
- Gender\*

The screenshot shows a web browser window with the address bar displaying the URL: [https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE\\_NEW\\_APPOINTMENT\\_SCREEN.BASIC\\_PERSON\\_SCREEN?l\\_uniq=MVM6894](https://shin.mis.ed.ac.uk:8179/pls/HRPM3/UOE_NEW_APPOINTMENT_SCREEN.BASIC_PERSON_SCREEN?l_uniq=MVM6894). The browser is Microsoft Internet Explorer. The page content includes the University of Edinburgh logo and the title 'Basic Personal Details'. Below the title, it says 'Please enter Basic Personal Details:'. The form contains the following fields:

|                        |   |                       |                                     |                |                                  |
|------------------------|---|-----------------------|-------------------------------------|----------------|----------------------------------|
| <b>Last Name *</b>     | <input type="text" value="Bloggs"/>     | <b>First Name *</b>   | <input type="text" value="Joseph"/> | <b>Title *</b> | <input type="text" value="Mr."/> |
| <b>Middle Name</b>     | <input type="text"/>                    | <b>Preferred Name</b> | <input type="text" value="Joe"/>    |                |                                  |
| <b>Date of Birth *</b> | <input type="text" value="1-Jun-1976"/> | <b>Gender *</b>       | <input type="text" value="Male"/>   |                |                                  |

Note: Fields marked with an asterisk (\*) are mandatory

Once you have completed all the relevant fields click on CONTINUE



A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. Once you click on CONTINUE you cannot go back and may any amendments.

The screenshot shows a Microsoft Internet Explorer window with the address bar displaying [https://shin.mis.ed.ac.uk:8179/pls/HRPM3/uoe\\_new\\_appointment\\_screens.CONFIRM\\_BASIC\\_PERSON\\_DETAL](https://shin.mis.ed.ac.uk:8179/pls/HRPM3/uoe_new_appointment_screens.CONFIRM_BASIC_PERSON_DETAL). The page header features the University of Edinburgh logo and the title "Confirm Basic Personal Details". Below the header, a message states: "Please check that the following details are correct before pressing Continue:". A table displays the following information:

|                 |            |
|-----------------|------------|
| Last Name:      | Bloggs     |
| First Name:     | Joseph     |
| Title:          | Mr.        |
| Middle Name:    |            |
| Preferred Name: | Joe        |
| Date of Birth:  | 1-Jun-1976 |
| Gender:         | Male       |

At the bottom of the form, there are two buttons: "Continue" and "Back to previous screen". The Windows taskbar at the bottom shows the Start button, several open Internet Explorer windows, and the system clock displaying 12:48.

### ADDRESS DETAILS SCREEN (see picture below)

If you have the Home Address for the new employee please complete the following fields, if not the system when producing the contract will automatically default to the pay address.

**These details are for the new employees HOME address only.**

**(If this appointment is for a Transfer then any Home address we hold will be displayed for you to view but you will not be able to update it, this must be done by the employee through Employee Self-Service)**

- Address Line 1 – (Initial Capitals e.g. 21 Hope Street)
- Address Line 2 – (Initial Capitals)
- Address Line 3 – (Initial Capitals)
- Town
- Postcode – (Capitals e.g. HH1 1HH)
- Home Phone Number

**Note: UK Address only to be entered**

https://shin.mis.ed.ac.uk:8179/pls/HRPM3/uoe\_new\_appointment\_screens.commit\_basic\_person\_detail - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address https://shin.mis.ed.ac.uk:8179/pls/HRPM3/uoe\_new\_appointment\_screens.commit\_basic\_person\_details Go Links

**THE UNIVERSITY of EDINBURGH** Address Details

**Please enter Address Details:**

Address Line 1  Address Line 2

Address Line 3  Town or City

Post Code  Home Phone Number

Please Note: Address must be UK address only.

If an address is supplied, it will appear on the contract, otherwise, the Office address will be used.

[Continue](#)

Done

start Internet

12:49

Once you have completed all the relevant fields click on CONTINUE

A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. Once you click on CONTINUE you can't go back and may any amendments.

THE UNIVERSITY OF EDINBURGH

### Confirm Address Details

Please check that the following details are correct before pressing Continue:

|                 |                |
|-----------------|----------------|
| Address Line 1: | 21 Hope Street |
| Address Line 2: |                |
| Address Line 3: |                |
| Town or City:   | HOPEVILLE      |
| Post Code:      | HH1 1HH        |
| Home Phone:     |                |

[Continue](#) [Back to previous screen](#)

## OTHER PERSON DETAILS SCREEN (see picture below)

**THE UNIVERSITY of EDINBURGH** Other Personal Details

**Please enter Other Personal Details:**

|                                   |                      |                            |   |
|-----------------------------------|----------------------|----------------------------|---|
| <b>NI Number</b>                  | <input type="text"/> | <b>Work Permit Number</b>  | <input type="text"/>                          |
| <b>Interview Date *</b>           | <input type="text"/> | <b>Offer Letter Date *</b> | <input type="text"/>                          |
| <b>Acceptance of Offer Date *</b> | <input type="text"/> | <b>Email Status *</b>      | <input type="text" value="Please Select..."/> |

*Fields marked with an asterisk (\*) are mandatory*

[Continue](#)

- NI Number\* – (If unknown leave blank)
- Work Permit No. – (If applicable, enter number from Work Permit)
- Interview Date – (dd/mm/yyyy)
- Offer Letter Date - (dd/mm/yyyy, should be after Interview Date)
- Acceptance of Offer Date - (dd/mm/yyyy, should be after Offer Letter Date)
- Email Status:
  - Not Required – (Not required to do the job)
  - Required Private – (Email held by HR and used for official correspondence but not visible publicly)
  - Required – (Email held by HR and visible publicly)

Once you have completed all the relevant fields click on CONTINUE

A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. **Once you click on CONTINUE you can't go back and may any amendments.**

https://shin.mis.ed.ac.uk:8179/pls/HRPM3/uo\_new\_appointment\_screens.CONFIRM\_OTHER\_PERSON\_DETAL - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Print Mail Address Book

Address https://shin.mis.ed.ac.uk:8179/pls/HRPM3/uo\_new\_appointment\_screens.CONFIRM\_OTHER\_PERSON\_DETAILS Go Links

**THE UNIVERSITY of EDINBURGH** **Confirm Other Personal Details**

**Please check that the following details are correct before pressing Continue:**

|                                  |                |
|----------------------------------|----------------|
| <b>NI Number:</b>                |                |
| <b>Work Permit No:</b>           |                |
| <b>Interview Date:</b>           | 01-MAY-2006    |
| <b>Offer Letter Date:</b>        | 02-MAY-2006    |
| <b>Acceptance of Offer Date:</b> | 03-MAY-2006    |
| <b>Email Status:</b>             | Email Required |

Done

start | Internet | 12:51

## APPOINTMENT DETAILS SCREEN (see picture below)

Complete the following fields (\* mandatory fields):

- Start Date\* - (dd/mm/yyyy)
- Organisation\* – *already completed*
- Location\* - (This will be populated with the default for the level 5 unit but can be amended by clearing the field and entering the required location from pick list)
- Personal Job Title\* – *already completed*
- Employment Category\* - *already completed*
- Grade\* - *already completed* (this can be lowered if required e.g. UE04 to UE03)
- Grade Step - (Please complete with the relevant point of the scale to which the new appointee is to be appointed (see scales on HR web page <http://www.humanresources.ed.ac.uk/pay/payscales>). The FT value for this will then appear on the confirmation screen. Do not complete if the new appointee is off-scale.
- 1st Increment Year\* - (enter the year the new appointee is to receive their first increment. Please note the new appointee should be in post by the 1<sup>st</sup> of May in a year to be eligible for an increment in the same year).
- Full/Part Time\* - *already completed* (if FT can be lowered to PT if required)
- Working Hours\* - *already completed* (hours can be reduced if required)
- FT End Date\* – (dd/mm/yyyy) Mandatory only if the Employment Category is Fixed Term
- FT Reason\* - Mandatory only if the Employment Category is Fixed Term
- Off Scale Salary – (Only to be entered when the new appointee's salary is not on an existing grade step)
- SOC Code\* - (This is a HESA code that identifies the new appointees job function)
- AR1B Date – (If applicable)
- AC & AM Grade, forms sent? – (If applicable)
- Honorary Status – (If applicable)
- ATR Number – *already completed*
- Vacancy Reference Number – *already completed*

**THE UNIVERSITY of EDINBURGH** Appointment Details

**Please enter Appointment Details:**

Start Date \*  Organisation \*  Location \*

Personal Job Title \*  Employment Category \*

Grade \*  Grade Step \*  First Increment Year \*  Full/Part Time \*

Working Hours \*  FT End Date  FT Reason (\* Fixed Term)

Off Scale Salary  SOC Code \*  AR1B Date (if applicable)

AC & AM Grades, forms sent? (if applicable)  Honorary Status (if applicable)

ATR Number  Vacancy Reference Number

*Note: Fields marked with an asterisk (\*) are mandatory*

There are other details relating to a new appointee, which have been automated in the system. They are as follows:

- Pension Scheme – This has been set to pick up the correct scheme for the Grade appointed to.
- Increment Month – This has been set to pick up the correct month for the Grade appointed to.
- Destination of Pay Slip – This has been set to go automatically to the new appointees level 5 unit.
- Probationary Period – This has been set to automatically record 26 weeks if the new appointee is on grades UE01 to UE05.

Once you have completed all the relevant fields click on CONTINUE

A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. **Once you click on CONTINUE you can't go back and may any amendments.**

**THE UNIVERSITY of EDINBURGH** Confirm Appointment Details

Please check that the following details are correct before pressing Continue:

|                              |                        |
|------------------------------|------------------------|
| Start Date:                  | 7-Aug-2006             |
| Organisation:                | Biomedical Sciences    |
| Location:                    | HUGH ROBSON BUILDING   |
| Personal Job Title:          | Professor              |
| Employee Category:           | Permanent              |
| Grade:                       | UE09                   |
| Grade Step:                  | 1                      |
| Increment Year:              | 2007                   |
| Full Time Equivalent Salary: | 38772                  |
| Full/Part Time:              | Full Time              |
| Working Hours:               | 35                     |
| Off Scale Salary:            |                        |
| FT End Date:                 | N/A                    |
| FT Reason:                   | N/A                    |
| SOC Code:                    | Academic Professionals |

|                              |                        |
|------------------------------|------------------------|
| Location:                    | HUGH ROBSON BUILDING   |
| Personal Job Title:          | Professor              |
| Employee Category:           | Permanent              |
| Grade:                       | UE09                   |
| Grade Step:                  | 1                      |
| Increment Year:              | 2007                   |
| Full Time Equivalent Salary: | 38772                  |
| Full/Part Time:              | Full Time              |
| Working Hours:               | 35                     |
| Off Scale Salary:            |                        |
| FT End Date:                 | N/A                    |
| FT Reason:                   | N/A                    |
| SOC Code:                    | Academic Professionals |
| AR1B Date:                   |                        |
| Ac & AM Grades, forms sent?: |                        |
| Honorary Status:             |                        |
| ATR Number:                  | MVM6894                |
| Vacancy Reference Number:    | 3001234                |

Continue Back to previous screen



## COSTING

*Already completed*

## ALLOWANCE

If the new appointee is to receive any allowances, then the allowance fields should be completed

- Name of Allowance – (choose the allowance from the list of values)
- Value – enter either the annual value of the allowance or the percentage of salary

https://shin.mis.ed.ac.uk:8179/pls/HRPM3/uoe\_new\_appointment\_screens.commit\_appointment\_details - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print View Source

Address https://shin.mis.ed.ac.uk:8179/pls/HRPM3/uoe\_new\_appointment\_screens.commit\_appointment\_details Go Links

**THE UNIVERSITY of EDINBURGH** **Costing and Allowance Details**

**Please enter Allowance Details:**

|                  | %   | Cost Centre | A/C Code | Job Code | Funding Source          |
|------------------|-----|-------------|----------|----------|-------------------------|
| <b>Costing *</b> | 100 | 424CHR      | 2140     | S00001   | University Of Edinburgh |
|                  |     |             |          |          |                         |
|                  |     |             |          |          |                         |
|                  |     |             |          |          |                         |
|                  |     |             |          |          |                         |

|                   | Allowance | Value |
|-------------------|-----------|-------|
| <b>Allowances</b> |           | ..    |
|                   |           | ..    |
|                   |           | ..    |
|                   |           | ..    |
|                   |           | ..    |

Note: Fields marked with an asterisk (\*) are mandatory

[Continue](#)

Done

start | ht... | ht... | O... | ht... | C... | E... | In... | ht... | Mi... | U... | ht... | ht... | EN | 12:59

Once you have completed all the relevant fields click on CONTINUE

A screen will then appear (see picture below) confirming all the information you have typed in, if this is correct then click on CONTINUE if not click on BACK TO PREVIOUS SCREEN to return to original screen and make amendments. **Once you click on CONTINUE you can't go back and may any amendments.**

THE UNIVERSITY of EDINBURGH

### Confirm Costing and Allowance Details

Please check that the following details are correct before pressing Continue:

| %   | Cost Centre | A/C Code | Job Code | Funding Source          |
|-----|-------------|----------|----------|-------------------------|
| 100 | 424CHR      | 2140     | S00001   | University Of Edinburgh |

[Continue](#) [Back to previous screen](#)

If the appointment details that have been entered mean that the new employee is eligible to be included in the Research Assessment Exercise (RAE) then the following screen will appear:

**THE UNIVERSITY of EDINBURGH** Additional Details

**Please enter Additional Contract Details:**

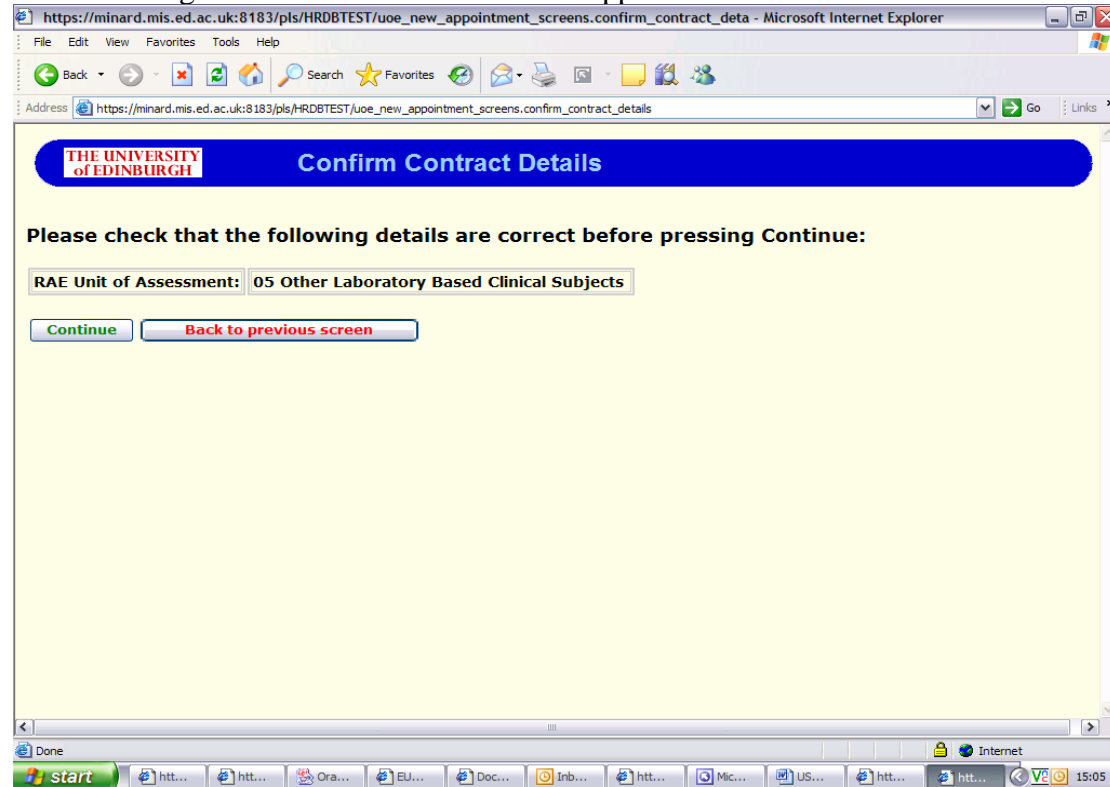
*Note: Fields marked with an asterisk (\*) are mandatory*

**RAE Unit of Assessment \***

[Continue](#)

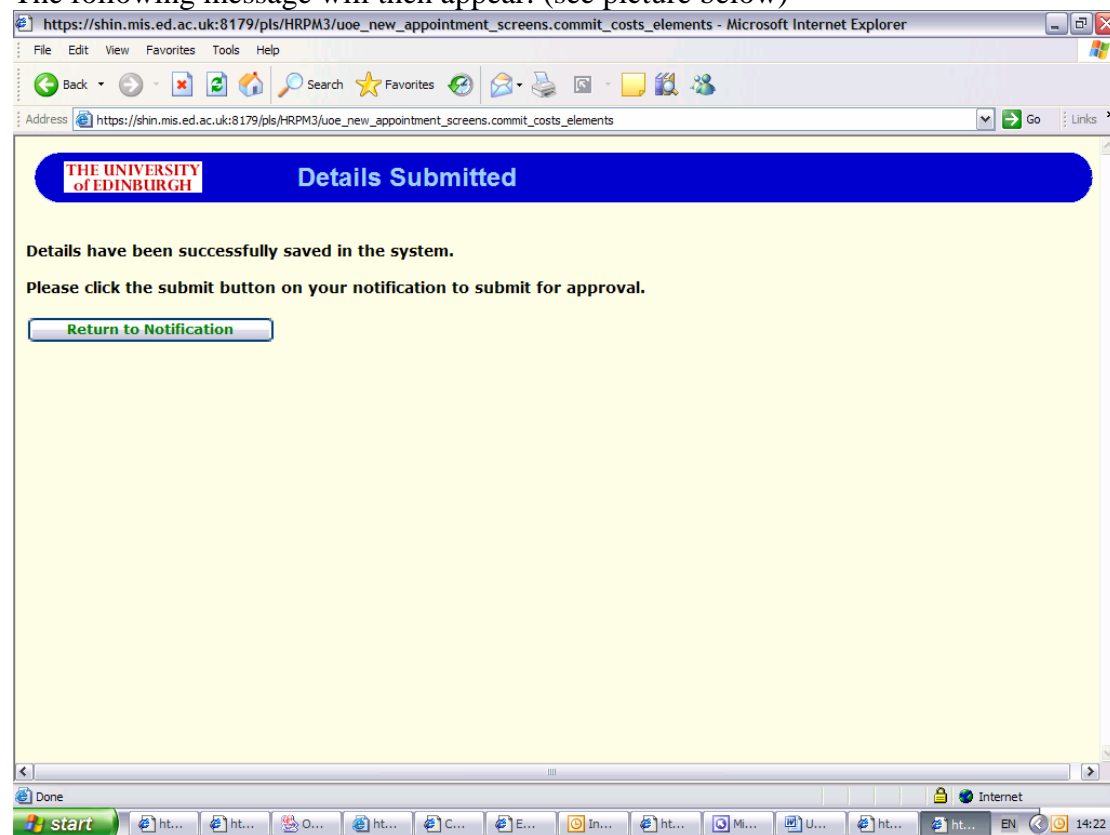
This is a mandatory field and you should select a value from the pick list to complete it. If you are unsure of the value that should be entered you should contact your School Administrator for advice.

The following confirmation screen will then appear:



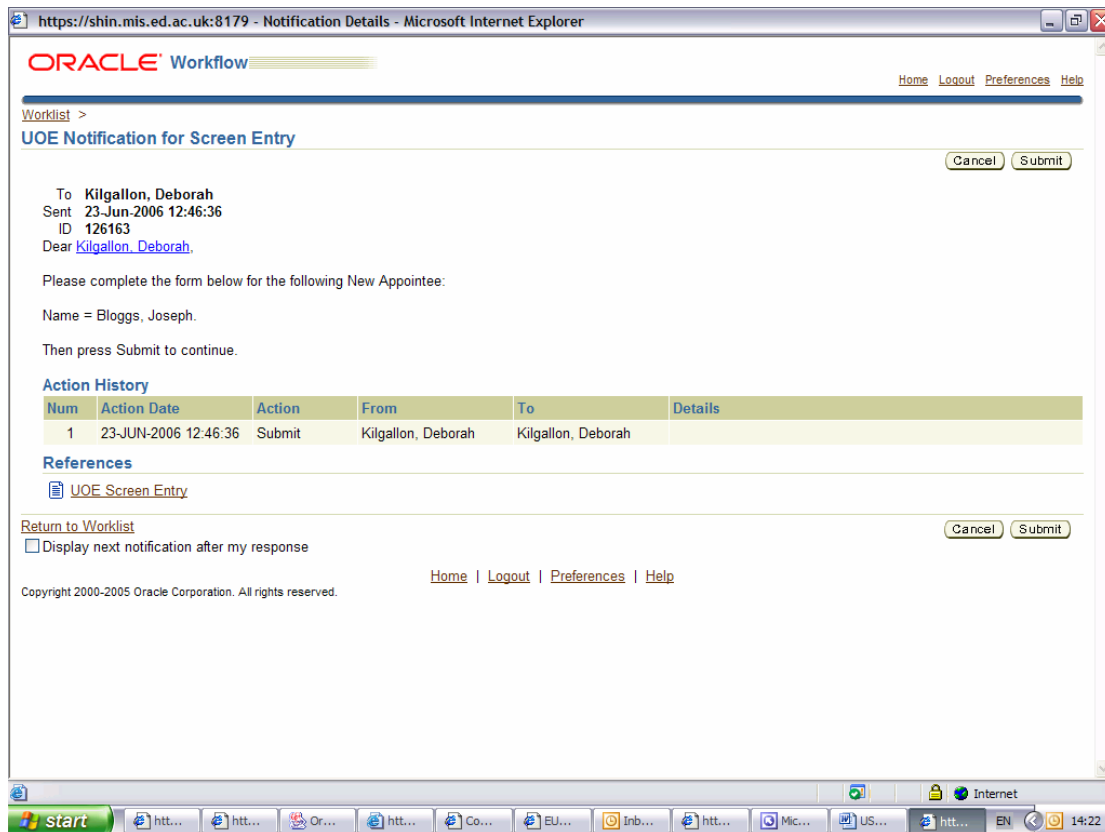
Click continue

The following message will then appear: (see picture below)



Your Notification Details Screen should now be on the screen (see picture below)

**Click on SUBMIT (if you decide at this stage to press CANCEL this will stop the work flow and ALL information will be lost)**



Once you have submitted this then the notification carries on to the Approver, Contract Generator and finally Payroll. You will at different stages receive further notification's regarding the appointment. These will be from the Contract Generator and Payroll informing you when the contract has been produced and sent out and when the contract has been accepted and returned to Payroll